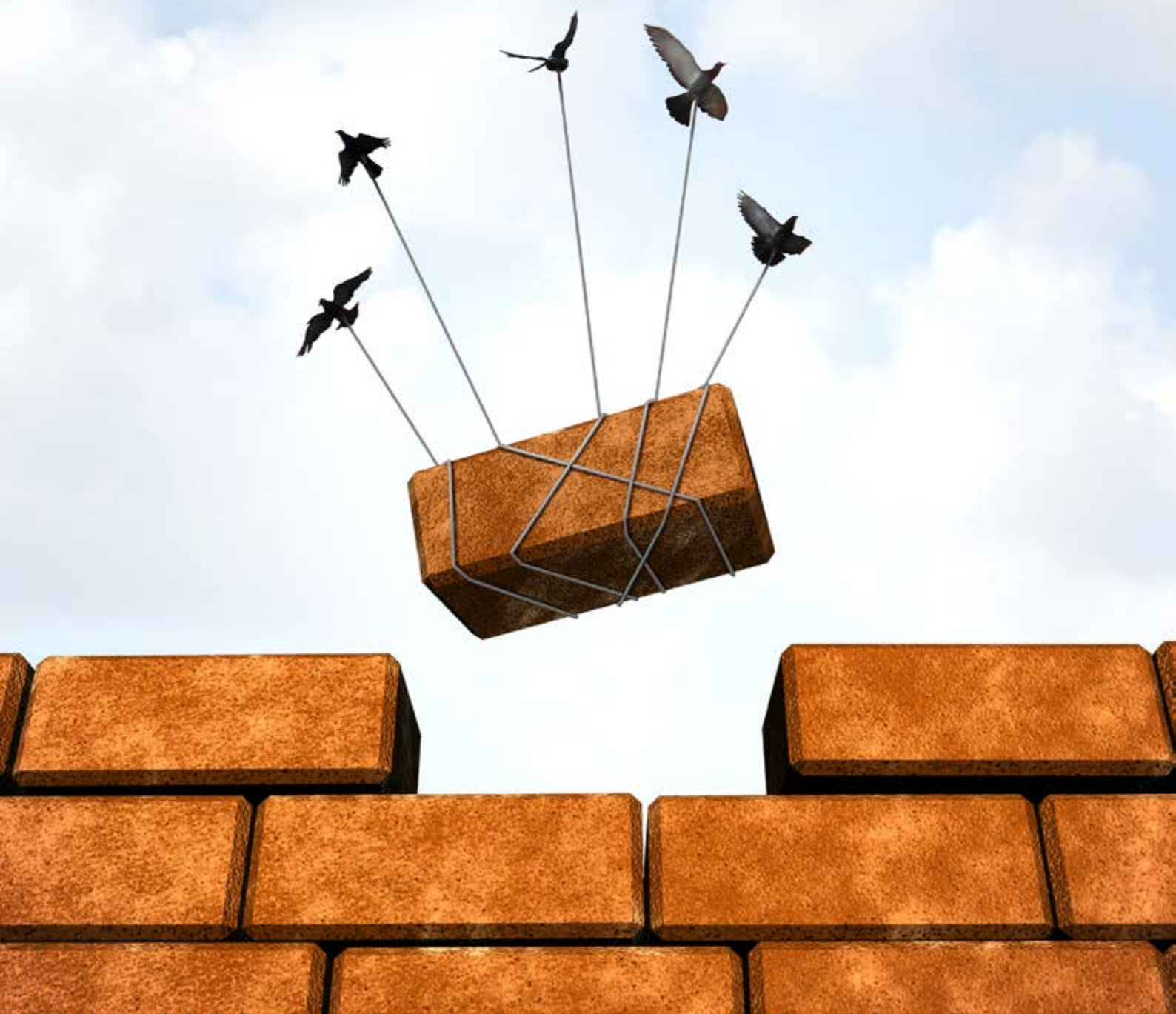


GOVERNMENT OF CURAÇAO



BUILDING ON STRENGTHS

NATIONAL DEVELOPMENT PLAN CURAÇAO 2015-2030



National Development Plan Curaçao 2015-2030

Foreword from Minister of Economic Development

This is Curaçao's National Development Plan, 2015-2030. This National Development Plan (NDP) is the first NDP using the seventeen Sustainable Development Goals which were adopted by the United Nations with the aim to transform our world. The road to this NDP began under the leadership of the former Minister of Economic Development, Abdul Nasser el Hakim, and was embraced by the successive Ministers of Economic Development - José Jardim, Steven Martina and Stanley Palm -, and subsequent Prime Ministers.

The process to get to this NDP was guided by the UNDP based on their methods and best practices. This has resulted in a document that is rooted in a moment in time, always owing debt to the past, but at the same time looking forward to the future with hope and anticipation. The process was characterised by a participatory approach which guaranteed the input of a large community of contributors, making it a plan for and of Curaçao.

This NDP pays dues to the vision statement for Curaçao that was adopted by the Island Council in 2006. By aligning with the Sustainable Development Goals (SDGs) of the UN, a framework was created to work on the eradication of poverty and creation of shared prosperity, the promotion of health, free and accessible education, a clean environment, sustainable energy, water management, and safety for all citizens. These topics are at the core of the development of any human being and the community.

The NDP presents an extraordinary opportunity for both the government and citizens of Curaçao to work together towards improving the quality of life for all citizens. As part of the process a focus on four of the seventeen SDGs was agreed upon:

- Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all (Goal 4).
- Ensure access to affordable, reliable, sustainable and modern energy for all (Goal 7).
- Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all (Goal 8).
- Conserve and sustainably use the oceans, seas and marine resources for sustainable development (Goal 14).

The NDP further selected five supporting themes which, together with the selected SDGs, offer a pathway for change. The NDP, and the plans and activities listed, form a consolidating framework, combining many organizational and sectoral master plans, and initiatives already underway, or about to be launched.

The strength of the NDP lies in positioning each of these master plans and initiatives within a larger, national framework. Implementation, prioritization, monitoring and steering for results will all be made more meaningful when these plans for change are integrated into national and international outcomes. This will foster further alignment between the policy areas of the respective ministries and drive a new way of working within government and between all stakeholders.

During various consultation rounds, the citizens of Curaçao wish to see their island rise up to its potential, especially in the areas of education, economic growth and environmental sustainability. The people of Curaçao feel that their future can and should be more prosperous, equitable, and thriving. The NDP provides an implementation process that facilitates unlocking the potential of Curaçao by presenting the vision, and facilitating commitment and consistent cooperation of all citizens.

This NDP would not have been possible without the many individuals who gave their time, provided information and participated in the process. I feel honoured that I happened to be the last in a long line of leaders who launched and shepherded the NDP. Now I would like to hand over this plan to the people of Curaçao in general, and more specific to the public, private, and social sector stakeholders in order for all of us to inspire, empower and execute for the benefit of the current and future generations of Curaçao.



Minister of Economic Development

Message from the United Nations Development Programme (UNDP)

The United Nations Development Programme (UNDP) is honoured to support the creation of the National Development Plan (NDP) for Curaçao. The NDP offers a consolidating framework of 5 interlocking themes which are education, economy, sustainability, national identity and good governance. The themes demonstrate that the NDP learns from the island's past; delineates concrete actions to be taken in the present; and delivers hope, for the future.

It is significant to note that the NDP is aligned to the Sustainable Development Goals (SDGs) and illustrates how States can adapt and prioritize the SDGs to their national context. For Curaçao this has meant a focus on four SDGs linked to Education, Economy and the Environment. The SDGs depend heavily on national ownership and leadership to be successful, hence the inclusion of national identity and good governance as two of the interlocking themes of the NDP.

The extensive consultations held to develop the NDP provided citizens of Curaçao with the opportunity to be included in deciding the future of their country and economy. Having gained greater political and economic autonomy, the NDP strives to empower citizens, through education and a growing economy, to be major contributors to the development of Curaçao. This inclusive, people-centred approach to development is instrumental to ensuring no Curaçaoan is left behind.

On behalf of the UNDP, I wish the people of Curaçao every success in implementing its National Development Plan and I pledge UNDP's continued unwavering support to the Government and people of Curaçao as it embarks on a new exciting and ambitious pathway to national development.



Richard Blewitt

UN Resident Representative and UNDP Resident Coordinator Trinidad and Tobago, Suriname, Aruba, Curaçao and St. Maarten.



Acknowledgements

The Government of Curaçao and the UNDP team are thankful to the many individuals and organisations who gave their time, insights, input and expertise in the development of this plan.

The extensive list of interviews in the Appendix provides some idea as to the breadth of participation from those whose contribution was given generously in anticipation of producing a plan to strengthen Curaçao.

We would especially like to thank the participants of the Tripartite Platform for National Dialogue ‘Kòrsou ta Avansá’ (Government/SSK/CGTC/VBC/KvK) who tirelessly met with the drafting team, arranged for presentations and thoughtful discussions, and without whose support this plan would not have been completed. Their ongoing support for implementation is also gratefully recognized.

The Secretary Generals and their management teams patiently and generously provided input and counsel and we’d like to recognize Ms. Stella van Rijn (AZ) and Luelo Girigorie (MEO). As well, input from Susan Larmonie-van Heydoorn, Policy Director from the Ministry of OWCS, enriched the Education Chapter. We acknowledge the assistance and support provided by Geraldine Gaari, the former SG of the MEO.

The Ministry of Economic Development sponsored and oversaw the planning process and the team of Zulaika Mook, Monique Bernadina, Irainety Copra and Natalie Petronella were instrumental in overall review, and in the provision of intellectual rigour within the Economic Chapter.

We were privileged to gain access to the management teams of all the various State Owned Enterprises who took time to present their accomplishments, risks and future plans. In particular the team is grateful to the Multi-Disciplinary Project Teams from the Refinery, the Tourism Board and CHATA, and the contributions from the management team at Aqualectra, both within the Economic Chapter as well as the Sustainability Chapter.

Mark Vermeij of Carmabi was instrumental in guidance on environmental initiatives in the Sustainability, as was Ms. Vanessa Toré, who must also be acknowledged as an early leader of the NDP process. Mike Jacobs, of the Central Statistics Bureau, was a patient contributor of data and national indicators.

Our thanks to the many Neighbourhood and Foundation leaders who cheerfully gave of their own time and support as the plan sought community input. In particular we wish to thank the Democratic Dialogue Coordinating team and associated facilitators.

Finally the UNDP team would like to thank the Council of Ministers who have supported and guided our efforts throughout this process.

And in turn, the Government of Curaçao would like to acknowledge the tremendous effort of the UNDP team: Ms. Shandy Capella, Ms. Nydia Adam, and particularly Mrs. Doreen Wilson and the Project Manager, Mr. Raynel Martis.



Executive Summary

This National Development Plan is based on a long-term vision of change for Curaçao in five interlocked themes – Education; Economy; Sustainability; National Identity and Good Governance – all working together to build a thriving nation.

The NDP incorporates a long-term vision, it is a plan focused on the execution of those catalytic short-term initiatives, which will put Curaçao on the path towards resiliency and attainment of its long-term vision. Integration with four Sustainable Development Goals (SDGs) provides a framework of measurable goals and targets at a critical time of global development, rooted in local challenges.



**SDGs provide
a framework
of goals**

The story of Curaçao is of an island with a long, accomplished history, celebrated in the arts and sporting excellence, welcoming the world to its shores, and protecting the vulnerable in its midst. The long-term vision for National Identity builds on these traits and deepens them. Curaçao will be a place known for its story, celebrations, welcome and accomplishments. The short-term focus for change begins with an articulation of the story, through dialogue and vision – who we are as a people, our place in the world, and what it means to be an exporting nation. Overall the short-term will be focused on accomplishment through cooperation – by working together on all aspects of this plan, people will deepen community trust and collaboration.



Sustainable Development Goal 4

Improving Education

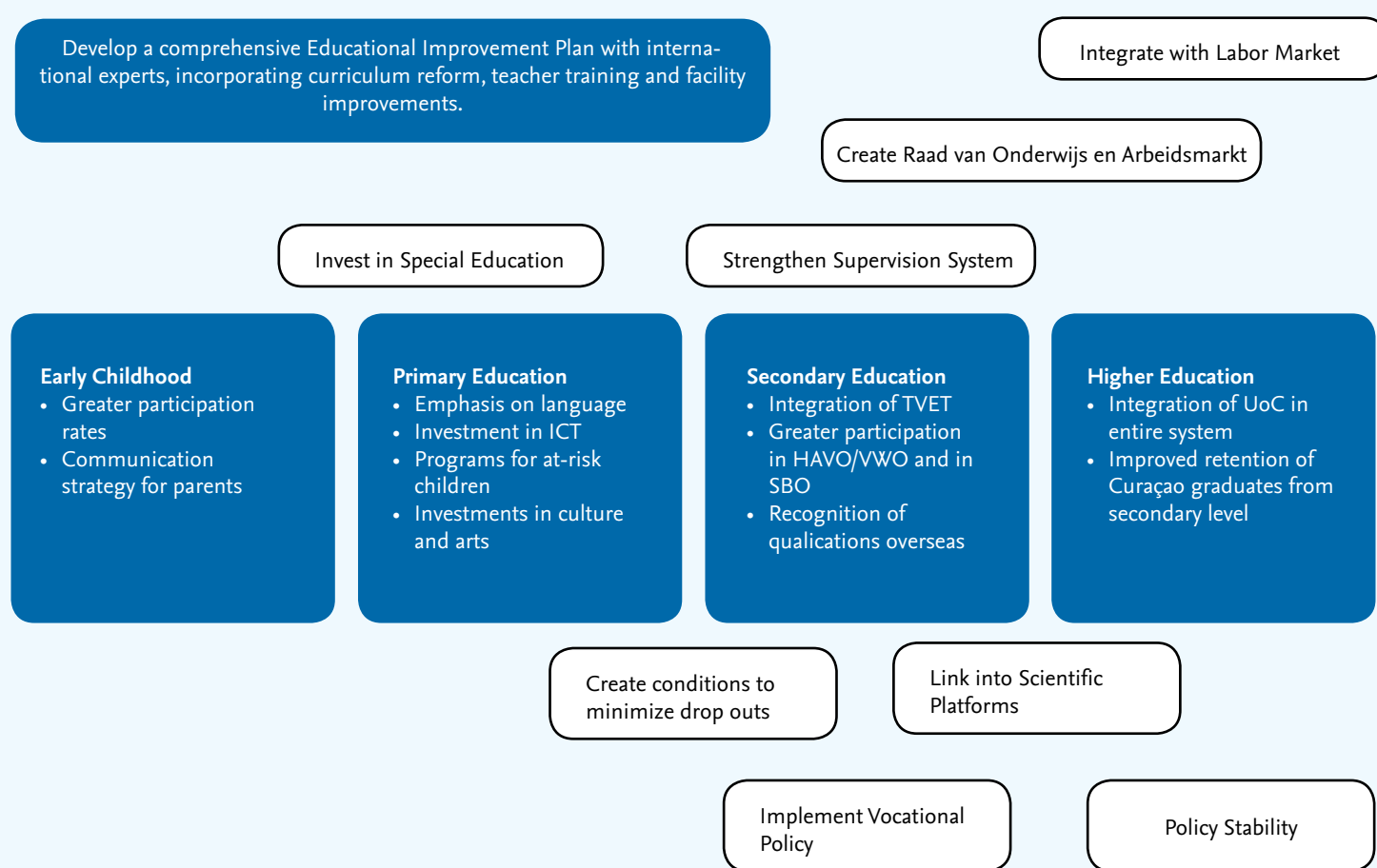
Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all



The long-term vision for Education is one where the island is the model, and hub, for the region. From early childhood through to graduation, Curaçao will be offering an educational system with a range of educational choices, where teachers and curriculum help form global citizens, and engaged citizens of the nation. Students will routinely achieve the highest level in their educational stream, whether vocational or academic, with skills of value to potential employers. The long-term vision includes an Education system working more in synch with local institutions, the labor market, and in the field of culture.

In the short-term, focus will be placed on increasing the numbers of children in Early Childhood programs, through demonstrating the value to parents, along with improving the quality of those programs. In addition, the government will engage with international experts to begin a more comprehensive educational reform, incorporating best practice in facilities, curriculum, policies and systems.

Investments will be made in Foundation-based and Vocation-based education to increase the number with accredited, vocational skills of particular use to the employers of Curaçao. And the labor market will work with Education to ensure that a growing economy offers employment to qualified young adults.





Sustainable Development Goal 8: Economic Growth

Economic Growth

Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all



The long-term vision for the economy of Curaçao is based on strengthening a diverse economy, which will be known for the quality of its exports, its service ethos, and where each economic pillar is contributing to the prosperity of the nation, through employment, reputation, foreign exchange and wealth. It will be among the leaders in regional GDP growth, in Balance of Payment metrics, in competitiveness, productivity and innovation. The generation of high value added jobs will be encouraging a return of the diaspora and, though the domestic labor market will be capable of meeting most requirements, a well-grounded immigration policy will welcome those with necessary skills.

In the short-term this plan outlines increasing profitability throughout the diverse exporting businesses of Curaçao by taking measures to increase competitiveness, labor flexibility, a more business friendly climate, and by providing targeted support to each of the economic pillars. 1) Government will focus on needed structural reform; 2) each sector will work with government to ensure their investment and growth plans can be implemented; 3) Government will invest in core services, such as energy, health, transportation, and others, not only to create an attractive place to invest, but for the benefit of all citizens; and 4) broad ownership of the implementation of the NDP, including the economic objectives, will ensure collective action and benefit.

Structural Reform & Government Support

- Labor Reform
- Trade Deals
- Fair Trade Authority
- Deregulation
- Others

Sectoral Growth

- Tourism
- International Finance
- Oil Refinery
- Government Enterprises
- Small and Medium Enterprises (SMEs) and others

Supporting Investments

- Education
- Electricity and Water
- Health
- Transportation
- Land Use

Broadening Ownership

- External Participation in Monitoring NDP
- Community dialogue on economic choices
- Making equitable and inclusive growth a priority – ensuring participation of the poorest



All industries, the existing and the yet to be imagined, will be assisted with ongoing introduction of business friendly initiatives. Corporate tax is now amongst the lowest in the region, and government will continue to streamline its license, permit and visa processes. Legislation is being introduced for a Fair Trade Authority, and government, the private sector and unions are committed to a collaborative approach to change, through an ILO sanctioned tri-partite arrangement. External trade agreements will help open markets and introduce a measure of competition and productivity.

Tourism will continue to be an important basis for the economy and will be supported through the execution of the 2015 Master Plan and its outline of early priorities, including increased airlift, marketing and investment in soft skills. International Financial Services will take re-establish its prominent place in the economy with government support, through harmonized legislation, new tax treaties and trade deals.

Options for the future of the refinery, set to expire in 2019, are well in-hand, with risks and opportunities and the need to meet environmental challenges all being considered in the scenarios. An investment with Curoil and the Curaçao Ports Authority in a LNG terminal at Bullenbai will provide a cleaner fuel for Curaçao, for individuals as well as businesses, and has the potential to dramatically reduce emissions at the refinery. Most emissions will be reduced by 98% or more, and greenhouse gases by 20%. The adoption of LNG as the operating fuel at the refinery will help extend the life of the refinery by 20-30 years, increase revenue and contribution to Foreign Exchange, GDP and jobs significantly (up to 4,000 temporary jobs and 500 permanent).

Other important export businesses, Marine, Logistics, Freezone, Transnational Education, Clean Energy and ICT, have focused plans for dealing with current challenges, including the need for capital investments for aging infrastructure, consideration of alternative business models, and other targeted solutions. This will require examination of Public Private Partnership (PPP) options which could provide the capital to expand markets for several State Owned Enterprises (SOEs) as well as introduce productivity and innovation. Thousands of new jobs stand to be created in the next five years.

Government will invest in education for the sake of its citizens, as well as the needs of the labor market, and in public good infrastructure and services. Education, utilities (such as telecommunications, postal delivery and energy), transportation and health are all facing challenges which demand strategic answers. The private sector, in turn, will play its role through investment in infrastructure, services, its employees and through marketing its services internationally, offering quality and satisfaction and raising the reputation of its business offerings.





Sustainable Development Goals 7 & 14

Environmental Responsibility

Ensure access to affordable, reliable, sustainable and modern energy for all

Conserve and sustainably use the oceans, seas and marine resources for sustainable development



The NDP's short-term objectives under Sustainability are primarily focused on environmental sustainability. Curaçao, as an island, is at particular risk to climate change. Two SDGs are relevant to Curaçao: better ocean, and integrated water resource management, and increased investment in renewable energy.

The government is working together with the Global Water Partnership, the local University and NGO stakeholders, to create an integrated water resource management plan, to better manage all water resources, including waste-water, rain water, water demand side and supporting regulation and legislation. Aqualectra is introducing Smart Meters and a water pipe rehabilitation project. Carmabi, along with government and other stakeholders, is researching and developing protective measures for reefs, coastlines and fisheries. A new sustainable fishery policy is almost complete.




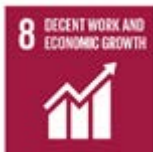


Curaçao is home to one of the healthiest coral reefs in the region and the need is urgent for research (such as the Blue Halo biodiversity project), regulation and protection.

Aqualectra has made substantial investments in renewable energy (wind and solar) and has plans for more investment in wind farms through a power purchase agreement. It currently provides 22% of its demand through renewable energy and is targeting 40% by 2020. Other efficiency measures (investment in Smart Meters and the grid) will help deliver cleaner, less expensive and more reliable energy.

A Framework for Measurement

The world approved Sustainable Development Goals (SDGs), as supported through the UN, in the autumn of 2015. This NDP has linked the strategic directions of this plan to four relevant SDGs.

Within each chapter specific initiatives are outlined against each goal, and indicator, as to how Curaçao plans to meet the SDGs.

SDG GOALS		PRIORITY THEME IN NDP	TARGETS
Goal 4	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all 	Education	<div>4.2</div> by 2030 ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education <div>4.3</div> by 2030 ensure equal access for all women and men to affordable quality technical, vocational and tertiary education, including university <div>4.4</div> by 2030, increase by x% the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship <div>4.c</div> by 2030 increase by x% the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially LDCs and SIDS
Goal 8	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all 	Economy	<div>8.3</div> promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage formalization and growth of micro-, small- and medium-sized enterprises including through access to financial services <div>8.6</div> by 2020 substantially reduce the proportion of youth not in employment, education or training <div>8.8</div> protect labour rights and promote safe and secure working environments of all workers, including migrant workers, particularly women migrants, and those in precarious employment <div>8.9</div> by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes local culture and products <div>8.10</div> strengthen the capacity of domestic financial institutions to encourage and to expand access to banking, insurance and financial services for all
Goal 7	Ensure access to affordable, reliable, sustainable and modern energy for all 	Environment	<div>7.1</div> by 2030 ensure universal access to affordable, reliable, and modern energy services <div>7.2</div> increase substantially the share of renewable energy in the global energy mix by 2030 <div>7.a</div> by 2030 enhance international cooperation to facilitate access to clean energy research and technologies, including renewable energy, energy efficiency, and advanced and cleaner fossil fuel technologies, and promote investment in energy infrastructure and clean energy technologies <div>7.b</div> by 2030 expand infrastructure and upgrade technology for supplying modern and sustainable energy services for all in developing countries, particularly LDCs and SIDS
Goal 14	Conserve and sustainably use the oceans, seas and marine resources for sustainable development 	Environment	<div>14.1</div> by 2025, prevent and significantly reduce marine pollution of all kinds, particularly from land-based activities, including marine debris and nutrient pollution <div>14.2</div> by 2020, sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration, to achieve healthy and productive oceans <div>14.3</div> minimize and address the impacts of ocean acidification, including through enhanced scientific cooperation at all levels <div>14.5</div> by 2020, conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on best available scientific information <div>14.7</div> by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism <div>14.a</div> increase scientific knowledge, develop research capacities and transfer marine technology taking into account the Intergovernmental Oceanographic Commission Criteria and Guidelines on the Transfer of Marine Technology, in order to improve ocean health and to enhance the contribution of marine biodiversity to the development of developing countries, in particular SIDS and LDCs

National Identity and Good Governance

It is an ambitious plan, and though Curaçao has been strong on plans, a new approach is needed for ongoing planning processes and implementation. Therefore there is a natural phasing to the implementation of priorities. Though there are early initiatives in each of the pillars for change, early action is needed on the economy, education and sustainable environment.

Economic growth is needed in the first instance, to generate revenue to fund other areas for change, to provide quick signals of change, and to generate belief for citizens that change is underway.

Education is a more long-term process, but investment in Early Childhood programs and the launching of educational reform can begin in the short-term. Demographics of an aging teacher and student population provides an opportunity for flexible use of existing resources in new ways. And of urgent importance will be a focused approach on vocational training – as the economy grows its need for a skilled workforce will be immediate. All efforts should be made to match local youth, unemployed and diaspora with the new opportunities. This is particularly urgent for Curaçao, where workforces in most businesses are nearing retirement with too few young staff to replace them.

The Environment is a critical global initiative with particular urgency for Small Island Developing States, and Curaçao has both ocean resource protection and renewable energy research and projects underway. More will be done to ensure energy costs become more affordable and its coastline, reefs and marine resources thrive for future generations.

Early progress can be made on these three areas, but of equal importance to long-term development is investment in two foundational areas: National Identity and Good Governance.

National Identity will be strengthened organically and over the long-term, even though dialogues on vision and identity will immediately build on prior efforts. Citizens will begin to believe in an unfolding vision when evidence of growth and change begin to accumulate, through economic growth and improved educational results. In addition it is in this area, where investment in justice, social programs, the arts and sports will be required, which will be most dependent on greater economic growth. Growth, education and opportunities will be inclusive – health care, transportation, safety, justice – these are, and will be, the hallmarks of a thriving Curaçao. Public Sector and political reform are complex and lengthy processes. Even though improvements in the political and administrative spheres were consistently identified as urgent reforms by most stakeholders, it is not possible to implement concurrent large-scale change on all fronts. Growth in the economy will provide the means and the momentum for phased reform throughout. However, three areas of improvement were identified for early and ongoing action: strengthening political capacity; improving transparency and ethical conduct; developing a citizen-responsive and professional public service.

A New Approach to Implementation

The long-term vision for Curaçao is one of enduring and ongoing implementation, of a nation investing in resiliency and sustainability which survives multiple changes in administration. The outline offered by this NDP, rooted in five themes which all must build on one another, was supported through multiple consultations and workshops and prior reports. It provides answers on what must be changed and why, and should endure. Elections and future administrations will determine who will effect change, and how, but within this NDP is the outline for long-term direction.

The National Development Plan, in many ways, does not offer a new “plan” for Curaçao, as much as it offers a framework and a process for implementing change that will endure and catalyze. Implementation will be based on shared responsibility, between politicians, government and external stakeholders, with the latter group taking an oversight and monitoring role. This oversight will be made more meaningful through the SDGs, associated targets and indicators, and a robust baseline. The UNDP is currently assisting the Central Bureau of Statistics with the creation and institutionalization of the national socio-economic database, making indicators for the SDGs a priority focus.

An implementation roadmap is offered in the plan, placing emphasis on early action in the fields of the economy and education, through a shared government/external platform and expert tiger teams. Transitional arrangements will be structured in such a way that they can be institutionalized in the medium-term, with capacity development offered to each constituent group.

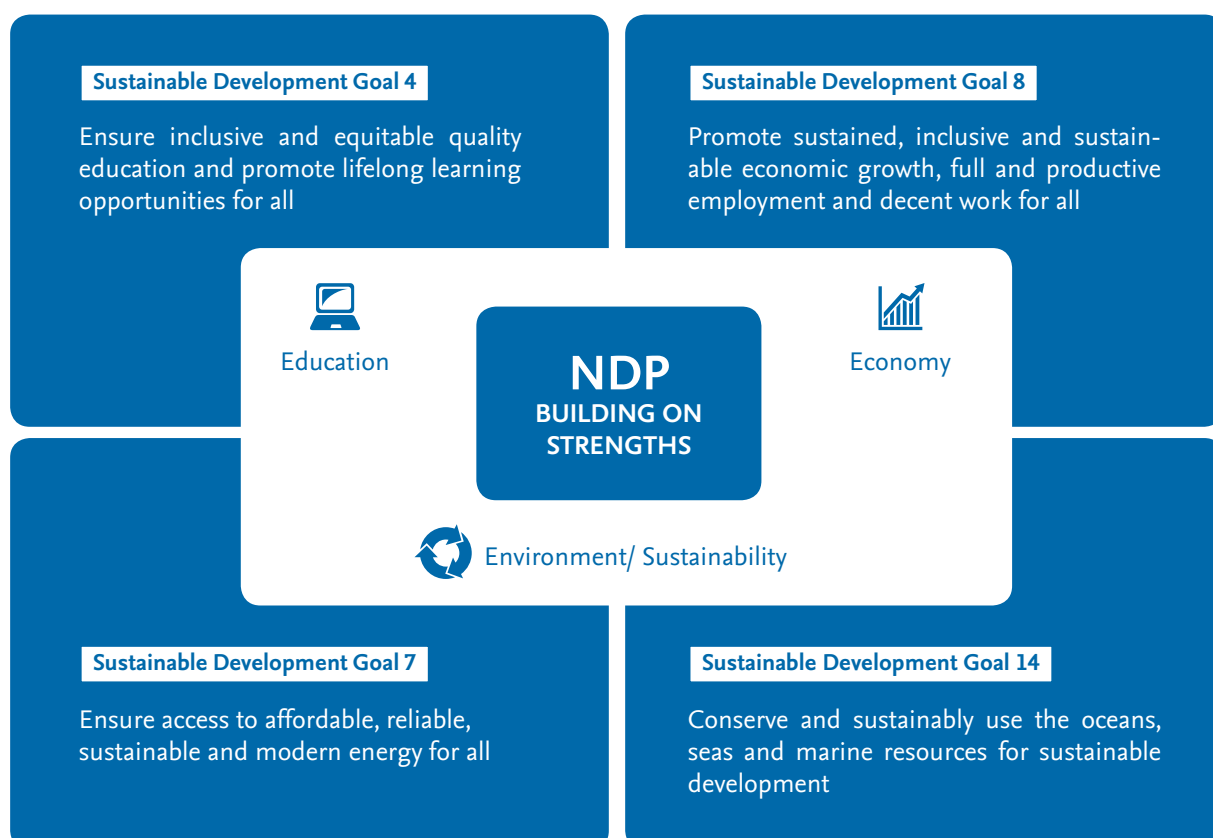


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Abbreviations

ADR	Average Daily Rate
ANG	Antilles Netherland Guilder
BPD	Ministry of Governance, Planning & Public Service
CAPEX	Capital Expenditures
CBS	Central Bureau of Statistics
CDF	Curaçao Development Fund
CDM	Curaçao Drydock Company Inc.
CIFA	Curaçao International Financial Services Association
CINEX	Curaçao Investment and Export Promotion Agency
CPA	Curaçao Port Authority
CPO	Curaçao Pilot's Organization
CPS	Curaçao Port Services
CTB	Curaçao Tourist Board
ECLAC	Economic Commission for Latin America and the Caribbean
EEVC	Erkenning Eerder Verworven Competenties
EU	European Union
FDDK	Fundashon Desaroyo Deportivo Kòrsou
FDI	Foreign Direct Investment
FKLB	Fundashon Kòrsou Limpi Bunita
GDP	Gross Domestic Product
HR	Human Resource
ICT	Information and Communications Technology
IFC/IFS	International Financial Services
ILO	International Labor Organization
IMF	International Monetary Fund
IP	Intellectual Property
ISLA	Isla Refineria
KBB	Kenniscentrum Beroepsonderwijs Bedrijfsleven Curaçao
KPI	Key Performance Indicator
KTK	Kompania di Tou Kòrsou
LTES	Long Term Economic Strategy
MDG	Millennium Development Goal
MDPT	Multi-Disipline Project Team
MEO	Ministry of Economic Development
NDP	National Development Plan
NGO	Non Governmental Organization

O&M	Operating and Maintenance
OECD	Organization of Economic Development
PDVSA	Petróleos de Venezuela S.A.
PFM	Public Finance Management
PPP	Private Public Partnership
PS	Public Sector (Service)
RevPar	Revenue Per Available Room
ROI	Return on Investment
SDG	Sustainable Development Goal
SG	Secretary General
SIDS	Small Island Developing States
SOAW	Ministry of Development, Labour & Welfare
SOE	State Owned Enterprise
SPI	Social Progress Index
TBD	to be determined
TI	Transparency International
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
USD	United States Dollar
USONA	Implementation Agency of the SONA Foundation
WTO	World Trade Organization



Vision

The aspirations of Curaçao were summed up in Vision 2025:

“By 2025, Curaçao is a country based on good governance, with high quality of life, sustainable socio economic development and education that is motivating to all citizens to develop themselves and to contribute to the development of their country”.

Under this vision, four strategic goals were included to:

- develop a high quality of life
- develop a high standard of living
- strengthen social cohesion
- increase adherence to democratic governance principles.

Under these broad hopes lies a range of choices. What investments will be needed to increase the standard of living and quality of life? What particular challenges face Curaçao in the area of social cohesion? What would adherence to democratic governance principles look like? And how does Curaçao, an island nation, affirm its place in the global context, offering investors and stakeholders opportunities to share in its prosperity?

This National Development Plan offers a coherent and practical strategy, based on goals and interlocking priorities, which will transform the aspirations of the vision into concrete results.

And though the NDP is focused on “hard” reforms in areas such as the economy, education and its governance arrangements, there is a proud tradition of arts and culture – the songs, dances and stories of Curaçao – which brings a vibrancy to the vision. Woven through its narrative is a cultural pride and legacy which underpins investment in the future. Tourism, education, family life, care for the vulnerable and transactions in the marketplace are imbued with the rhythms of Curaçao values and art. Growth and development are shot through with the colors of Curaçao.



Introduction

Every National Development Strategy and Plan is, at its heart, a story. A story of who we are, where we wish to be, what might hinder us from getting there, and how those barriers can be overcome.

National narratives matter – they shape individual as well as collective decisions and powerfully shape the future of a country.

This National Development Plan (NDP) is unique in a number of ways. First, it is primarily based on extensive consultations and analysis of prior plans, identifying some of the past barriers to implementation and recommending five priority themes: preconditions which must be in place for any future success. While most NDPs are lengthy documents based on sectoral priorities, this NDP is focused on these areas, with recommendations for progress in the short term (1-4 years), while maintaining a fifteen year planning horizon. This approach is consistent with current best international practice, where government must increasingly be nimble and strategic and partnered in order to achieve change. Complex issues require multi-stakeholder answers, which bend and are shaped as circumstances change.¹

Secondly its overarching framework is one of sustainability – building in resiliency in order to deliver sustainable change. This is one of the first NDP's anywhere to be integrated into the newly proposed Sustainable Development Goals, SDGs, which are replacing Millennium Development Goals within the UN system. Four SDGs of particular strategic importance to Curaçao offer tangible goals and indicators and a basis for regional and national cooperation.

And finally the introduction contains a story. Capturing the imagination of a country using concrete investment clusters is very much based in the history, the trajectory and the desired outcome of Curaçao's narrative. This plan does not outline all the worthy projects that could be done – Curaçao has plenty of those kinds of plans. Rather it is a plan based on the critical choices rooted in this moment of time. By limiting the areas of focus to these clusters the NDP offers support for successful implementation.

This NDP gives a basis for what must be done, why, and the action plan outlines who will be responsible. Extensive consultations² and an in-depth stakeholder retreat confirmed these findings. Debates and elections and annual planning will continue to shape how these priorities are met and by whom. But the intention is that the NDP proves to be an enduring statement of agreed national directions, which will continue to be executed over the coming decade.

1 See Foresight as a Strategic Long-Term Planning Tool for Developing Countries and Stewardship of the Future: Using Strategic Foresight in 21st Century Governance (UNDP Global Centre for Public Service Excellence, 2015)

2 See appendices for list of consultations and interviews

The Story

The story underpinning the National Development Plan, and why each theme is important, is outlined below:

Past and Current:	Future, dependent development:
Curaçao is rooted in a common history and relationship with its Caribbean sister islands but, as well, is an island set apart. Its geographic, legal and historic linkages make it an integral hub player, while at the same time its diverse economy distinguishes it from most other Caribbean islands. Though tourism is important, it is not the sole economic pillar.	Curaçao is an island unlike others, with a broader and diverse economy. This provides opportunities and advantages.
Over the last decade the economic performance has stalled. Traditional industrial, international financial and other services have faced competitive and legal challenges, and though tourism has grown in Curaçao it has lost market share to other Caribbean islands. The economy of Curaçao is, and must continue to be, focused on export of products and services across its priority pillars.	Curaçao needs to stimulate and support its diverse export pillars in order to increase prosperity and employment. Barriers hindering this performance will be addressed.
One of the benefits of a diverse economy is the wide range of skills needed within each economic pillar – Curaçao has always offered opportunities for professionals and novices alike. However many graduate students move abroad for their university degrees (and don't come back), while employers feel the need to reach out to international prospects to fill urgent job requirements.	An increase in employment must be matched with a reformed Education system, developing students in diverse, skilled areas (academic and vocational), even while the government promotes smart immigration and diaspora policies to fill critical gaps.
Economic development and education are not ends in themselves. Protection of the vulnerable, and dignity for all citizens is a key value for Curaçao, now more so than ever with an aging population and a widening income gap. The strengthening of national identity, and a pulling together towards common goals will ensure the execution of the NDP.	People are at the heart of development. The people of Curaçao will pull together towards a shared vision, ensuring a long-term execution of the NDP and commitment to sharing wealth with the economically vulnerable
Curaçao is at a crossroads in its development as an island nation, increasingly taking on governance responsibilities and maturing into its place on the global stage. All aspects of the NDP rest on good governance, including an impartial and professional bureaucracy and more mature politics.	Citizens working together towards better education and prosperity cannot do it alone– Curaçao needs leadership, government policies that support a business friendly climate, and equal, fair and transparent access for all. Governance reform is a key pillar for the NDP.
Finally development is for the long-term, and for resiliency with which to meet future challenges. Sustainability is built into the strategies of all interlocked themes.	The National Development Plan is not a short-term initiative, but geared towards sustainability – in the environment, economy, people and governance of the island.

Five clusters for development are contained within the flow of this narrative: the possibilities of economic growth rooted in a diverse economy, an economy in synch with a well-functioning education system.



The high performance of both the economy and the education system are not ends in themselves, and cannot be achieved through individual action. Rather Curaçao wishes to grow its wealth for the benefit of all citizens, who must also join together in these initiatives through cooperation, sacrifice and a commitment to a new future, as supported through strengthened national identity. Implementation of this plan will rest, primarily, on the efforts of a professional public service and healthy political system: and so good governance and leadership logically flows from the narrative. Investing in the future ensures that growth and prosperity will be ongoing, not at the expense of limited natural resources, but through careful stewardship of the environment. Increasing reliance on renewable energy and long-term ocean management, along with other environmental stewardship initiatives. Sustainable growth is at the heart of the plan.

The story is one of an island at the cross-roads – historically, geographically, economically and politically, and of an island with a wealth of possibility. The NDP outlines the taking up of that possibility and shaping a better long-term future for Curaçao through execution of short-term priorities and plans.

Five Interdependent Themes

It is a small island with remarkably large achievements. While many Caribbean islands are dependent on tourism, Curaçao has also developed an inner harbor with significant economic actors: marine services, bunkering, the refinery, dry docks, Freezone, International Financial Services and a logistical hub for regional and domestic shipments. The refinery has a long history, having been established in 1918, leading to the island absorbing an influx of immigrant refinery workers. The inner harbor, refinery and bridges testify to the capacity of a small population to accomplish large projects.

It is also an island with an abundance of opportunities. Its geographic position lies outside the hurricane belt; its traditional ties to the Netherlands provides a legal and economic basis for confident trade and investment arrangements; its multi-lingual population is a valuable resource for interaction with the world; and extensive capital infrastructure along with deep harbors offers a economic choices and opportunities.

But, more recently, indications of potential weaknesses have emerged including an economic performance that has lagged the region. Many plans have been commissioned but implementation has been patchy.

The economy is poised to break out of its stagnation but this economic take-off will depend on skilled labor, qualified to take their place in the growing businesses. And thus the education system needs a reform to better match proficiency to opportunity, and this will require the cooperation of many stakeholders, supportive government institutions and stable political leadership.

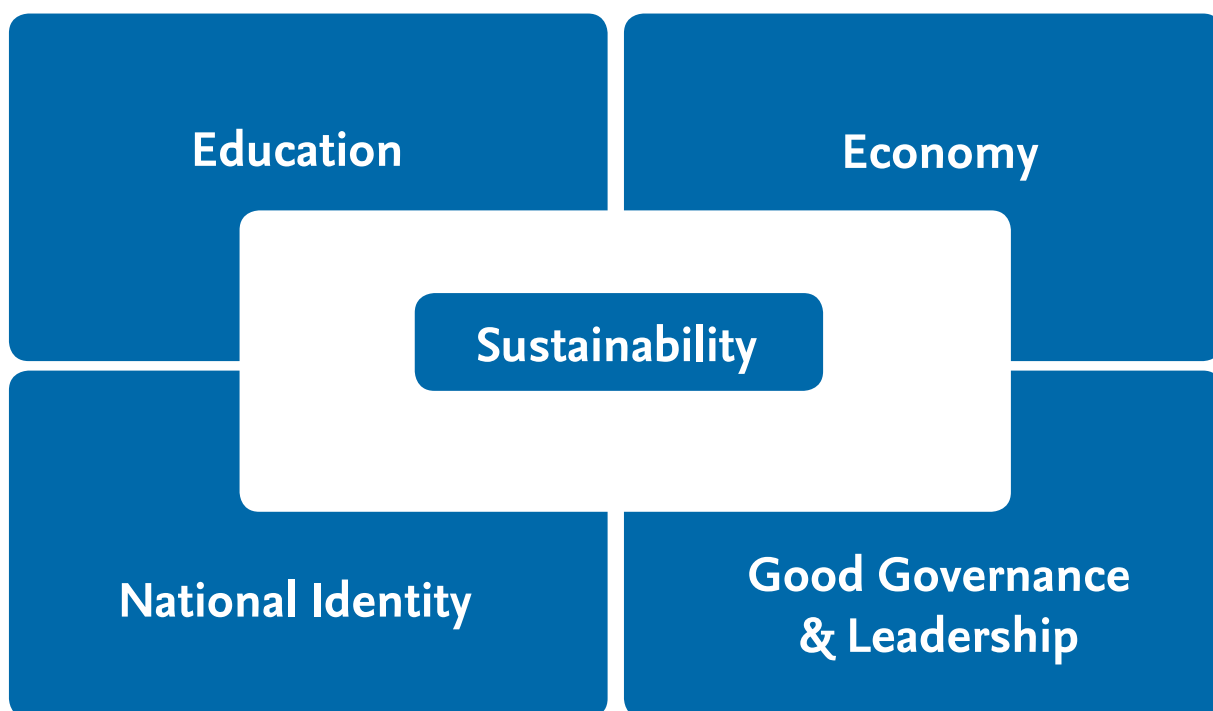


Figure 1

This NDP is based on commitment by all to making a difference in each area in order to make a difference to the nation.

It has been structured to describe the interlocking themes, on why they are important, describing current reality (threats and weaknesses) and the opportunities (strengths and opportunities), followed by what actions will be taken, focused on the short-term (1-4 years) leading to long-term, sustainable change 10-15 years). The themes shaded in blue represent areas for change driven by relevant Sustainable Development Goals, while the themes shaded in green are fundamental conditions for ongoing transformation.

Sustainable Development Goals

The Millennium Development Goals (MDGs) expired in September, 2015, and have been replaced by 17 Sustainable Development Goals (SDGs)³. The SDGs reflect the lessons learned from the MDG process: that development must be inclusive, resilient, long-term and (of course) sustainable, in all meanings of the term.




They offer a framework of goals, including targets and indicators, which are both global and local. Meaningful implementation of the NDP requires measurable goals and a baseline of indicators and the SDGs provide this. Feedback from stakeholders indicates the early importance of three themes (Education, Economy and Sustainable Environment), each of which lines up against relevant SDGs.


³ See Appendix for details on the proposed SDGs

The UNDP Kòrsou Kapasité project includes strengthening the national socio-economic database, with institutionalized capacity, and has completed an analysis on the availability and relevance of SDG targets and indicators.

The following table outlines the four SDGs, and related targets and indicators:

Table 1

SDG GOALS		PRIORITY THEME	TARGETS
Goal 4	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all 	Education	<p>4.2 by 2030 ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education</p> <p>4.3 by 2030 ensure equal access for all women and men to affordable quality technical, vocational and tertiary education, including university</p> <p>4.4 by 2030, increase by x% the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship</p> <p>4.c by 2030 increase by x% the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially LDCs and SIDS</p>
Goal 8	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all 	Economy	<p>8.3 promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage formalization and growth of micro-, small- and medium-sized enterprises including through access to financial services</p> <p>8.6 by 2020 substantially reduce the proportion of youth not in employment, education or training</p> <p>8.8 protect labour rights and promote safe and secure working environments of all workers, including migrant workers, particularly women migrants, and those in precarious employment</p> <p>8.9 by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes local culture and products</p> <p>8.10 strengthen the capacity of domestic financial institutions to encourage and to expand access to banking, insurance and financial services for all</p>
Goal 7	Ensure access to affordable, reliable, sustainable and modern energy for all 	Environment	<p>7.1 by 2030 ensure universal access to affordable, reliable, and modern energy services</p> <p>7.2 increase substantially the share of renewable energy in the global energy mix by 2030 7.a by 2030 enhance international cooperation to facilitate access to clean energy research and technologies, including renewable energy, energy efficiency, and advanced and cleaner fossil fuel technologies, and promote investment in energy infrastructure and clean energy technologies</p> <p>7.b by 2030 expand infrastructure and upgrade technology for supplying modern and sustainable energy services for all in developing countries, particularly LDCs and SIDS</p>

SDG GOALS	PRIORITY THEME	TARGETS
Goal 14 Conserve and sustainably use the oceans, seas and marine resources for sustainable development 	Environment	<p>14.1 by 2025, prevent and significantly reduce marine pollution of all kinds, particularly from land-based activities, including marine debris and nutrient pollution</p> <p>14.2 by 2020, sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration, to achieve healthy and productive oceans</p> <p>14.3 minimize and address the impacts of ocean acidification, including through enhanced scientific co-operation at all levels</p> <p>14.5 by 2020, conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on best available scientific information</p> <p>14.7 by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism</p> <p>14.a increase scientific knowledge, develop research capacities and transfer marine technology taking into account the Intergovernmental Oceanographic Commission Criteria and Guidelines on the Transfer of Marine Technology, in order to improve ocean health and to enhance the contribution of marine biodiversity to the development of developing countries, in particular SIDS and LDCs</p>

The SDGs, and associated indicators, will be localized for Curaçao through a regional process, and aligned with the socio-economic database, so that the nation will have meaningful, relevant and available measures for progress. The SDGs also provide a source of Key Performance Indicators (KPIs) which can be institutionalized into Public Service Planning. Secretary Generals and Ministries, including key personnel, will be able to adopt the KPIs as an evaluation tool in Ministry business plans along with annual performance agreements.

Methodology

The approach taken for developing this plan was modified from the best practice note published by the UNDP (in particular the Preparing National Strategies to Achieve the Millennium Development Goals, a Handbook; 2005) based on the context of Curaçao and recommendations from the scoping paper prepared for Government by Philip Thomas and the UNDP.

The context for Curaçao included three relevant factors:

1. Many detailed and well-researched plans and sectoral business cases were available for inclusion and integration. Most significantly a comprehensive Labor Force Development Plan had been agreed through the Tri-Partite Council in 2008 ⁴ and a Long-Term Economic Strategy (LTES) was completed by the TAC Associates in 2013.
2. Extensive interviews ⁵ for this project (both NDP and Scoping Report) indicated weariness with further plans, and support for execution of initiatives.
3. A tight timeframe required a focused approach, using existing plans and initiatives as the baseline and providing a basis for “quick wins” that were grounded in progress towards a long-term vision. In other words, a focus on taking catalytic early steps that would provide momentum towards sustainable development.

As such the approach outlined in the Scoping Report of 2013 is summarized below ⁶:

1. Develop a draft NDP based on existing plans and assessments;
2. Identify gaps and update initiatives with stakeholders;
3. Hold a high level retreat to validate findings and direction;
4. Work with inter-ministerial groups and other stakeholders to close information gaps;
5. Transform draft NDP into creative presentation and hold neighbourhood dialogues, using democratic dialogue techniques to validate the vision and direction;
6. Finalize vision based on these dialogues, agree action and implementation plan, assigning accountability, budget and timing;
7. Establish monitoring and evaluation [and implementation] mechanism.

The modification of the UNDP practice note is summarized in the diagram below:

Consultative Process	<ul style="list-style-type: none"> • Dialogue Process with neighbourhoods • Regular updating with Tripartite • Engagement with SG Council and Expert Stakeholders
Baseline and Needs Assessment	<ul style="list-style-type: none"> • Analyze existing plans and data for development themes • Themes should be dependent and supportive of overall direction
Confirm	<ul style="list-style-type: none"> • Hold retreat to confirm hypothesis
Strategic Foresight Modelling	<ul style="list-style-type: none"> • Scenario planning on possible futures • Determine which issues can be changed early
Set Goals, outcomes and strategies	<ul style="list-style-type: none"> • Place outcomes into a logic model
Integrate in written plan	<ul style="list-style-type: none"> • Drafts provided to Ministries and stakeholders for feedback • Set priorities within action plan and implementation model

Figure 2

⁴ The 2008 Labor Force Development Policy and Structural Proposal forms the basis for the recommended initiatives within the Economic Development section of the NDP

⁵ See Appendix for list of all consultations

⁶ For the full approach see pages 9&10 of “Towards a National Development Plan Process in Curaçao; UNDP, 2013, Philip Thomas

The primary task of the NDP, therefore, was to discern the common strategic themes within the sectoral and national plans, provide a narrow but compelling cluster of priorities within which to base decisions, and to provide the framework for short-term action leading to sustainable change. The approach taken for discerning these themes was based on four factors:

1. Careful reading of the many plans and reports provided, to compile repeated themes and challenges.
2. Collection of management information and data in each area, to confirm or challenge perceptions around these themes.
3. Raise the emerging insights in all meetings and interviews, for confirmation or dismissal of the insights.
4. Hold a large retreat where the themes were presented, along with data, to relevant stakeholders.

In addition to following this methodology, the team also incorporated an emerging best practice, which is one based on strategic foresight.⁷ It differs from traditional planning in focusing less on detailed sectoral planning, and less on long-term plans based on only one desired future. Rather strategic foresight places emphasis on flexibility and a planning process that includes a range of possible outcomes including what is plausible, probable, possible and preferred. A policy analyst from PAPEP (Political Analysis and Prospective Scenarios Project) was invited to facilitate a strategic foresight session, where a range of possible futures were envisioned. The large group of participants then identified the most likely futures, and the issues which were most amenable to change. From this session it emerged that Education and Economy, along with some aspects of the Environment, were most open to being transformed, and confirmed these as early priorities for the NDP.

The five clusters identified and validated at the high level retreat held in February, 2015, form the outline of this NDP: National Identity; Education; Economy; Good Governance and Leadership; all within the umbrella of Sustainability.

Each cluster has been analysed, using existing reports, interviews and baseline information, for Strengths and Weaknesses (presented in Why is this Important?) and for Opportunities and Threats (presented in What Will be Done). Emphasis is placed on where improvements will lead to the most desired outcome.

⁷ Foresight as a Strategic Long-Term Planning Tool for Developing Countries (2015) and Stewardship of the Future: Using Strategic Foresight in 21st Century Governance (2015), Discussion papers from UNDP's Global Centre for Public Service Excellence, Singapore



Education

Why is this Important?

Education is an investment in a nation's future, its identity, the community, the economy and in individuals themselves. Just as food is necessary for a healthy body, education is the fuel for a happy and successful life. Receiving a quality education is never solely tied to economic outcomes, but rather it is one of the important means of developing well-rounded and principled citizens. Education offers inner and outer strength to a person and is a fundamental right. Making an investment in education has been identified as a key priority by the majority of stakeholders, recognizing that growth and development in the nation is dependent on the development of its children and young people in all facets of mind, body and spirit. Education moreover does not end while finishing school. Lifelong learning to keep abreast of new developments is necessary to maintain a link between education and the labor market

Curaçao has many advantages in its educational system – rooted in a European system it provides a solid academic formulation, and an emphasis on languages (Dutch and Papiamentu are the instructional languages, while English and Spanish are widely taught subjects) provides the basis for a multi-lingual education.



Figure 3

Total student numbers: Decrease/ Increase

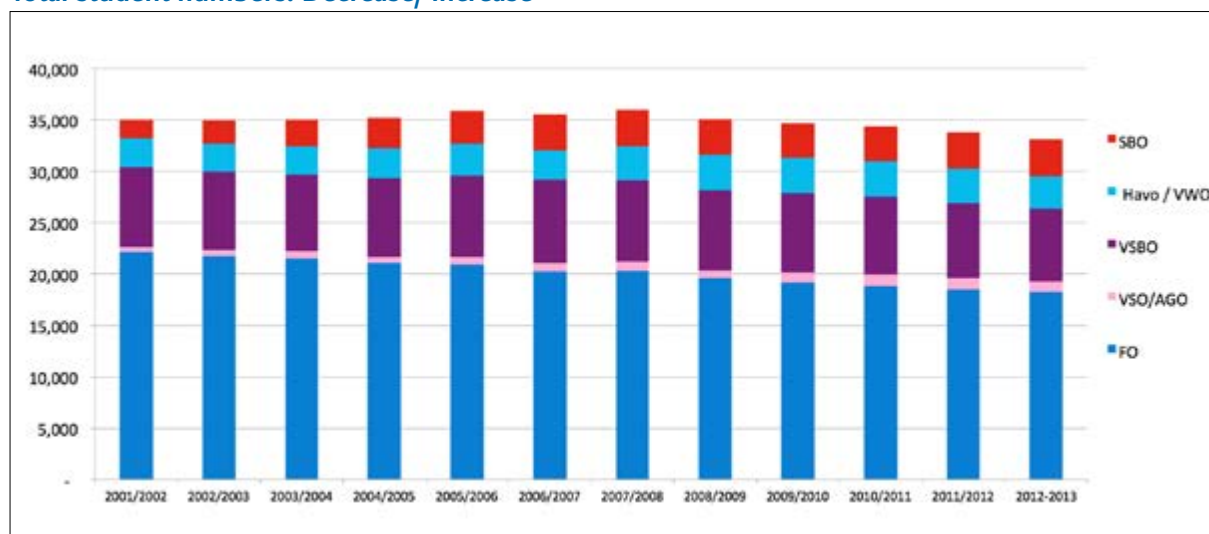


Figure 4

The chart above provides student numbers across a decade. The downward trend in overall number reflects the aging demographics in Curaçao – total student population has declined 9% across this chart (from the highest point to 2014). Meanwhile the percentage attending HAVO/VWO and SBO (the highest qualifying programs in the academic and vocational streams) has increased, partly reflecting a change in compulsory education in 2007, when the age was raised from 15 to 18. The increase in numbers attending HAVO/VWO is 13% compared to 2001, while SBO numbers have increased 65% (from 1,823 students in 2001 to 3,766 in 2014). In prior years the number of HAVO/VWO places was strictly limited but recent policy changes allow for increased participation. There is now a need to reform the examination process which determines eligibility for HAVO/VWO to ensure maximum opportunity for those with the desire to participate. Not only have there been improvements in the number of students attaining higher levels in the last decade, Curaçao's education indicators are favourable in comparison to the region.

Table 2

Indicators	Curaçao ⁹	Latin America and Caribbean region average ¹⁰
% GDP spent on Education (2014)	6%	5.2%
% of National Budget spent on Education (2014)	19.6%	14%
Early childhood enrolment	44%	66%
Primary enrolment	99%	94%
Secondary enrolment	98%	72%
Not completed secondary	32% ¹¹	50%
Adult Literacy	96.5%	93%

9 Figures from CBS, Ministry of Education, and as calculated

10 Figures from The State of Education in Latin America and the Caribbean; UNESCO Regional Office, 2013

11 this figure uses the CBS definition of drop-outs which measures the number of 15-25 year olds not attending school against the number without school certification, a definition which may not be used by other jurisdictions and is not used by the Ministry of Education. One recommendation is for CBS and Ministry of Education to work together on a common definition of drop-outs

The strengths of the education system in Curaçao are evident in both its links to the Dutch system, as well as in comparison to the region. However three areas show indications of weakness and must be addressed. One is the level of children attending early childhood programs (Curaçao is currently 22% lower than the region, though the comparison may not be exact due to differing age requirements for kindergarten. The system on the island provides for an earlier start in kindergarten, where children of Curaçao enter kindergarten at age 4).

A second weakness does not show up in indicators but has been often raised in interviews – the Dutch curriculum and system has been both a strength and weakness. It has been used for many generations as a solid foundation but it has not been updated from within. Technology, in science, new approaches to teaching, innovations in the curriculum are not based on the local context or on local needs. Child-friendly spaces are needed, but the budget does not provide for them. Dutch as a language of instruction is also an extra barrier for most students in all levels of education. The introduction of technology into classrooms has also been lagging and investment in teacher training along with technology will be required if students in Curaçao are to be competitive on the world stage.

An area raised in interviews is linked to the above: there are persistent difficulties in matching job opportunities with qualified candidates, requiring employers to look abroad for some vacancies. The most recent Tourism Master Plan reports indicate that tourism businesses are finding it difficult to recruit locally. The Long Term Economic Strategy report states “Overall, the education system is not responsive to the needs of the island in general and of employers in particular”¹² The Labor Force Development Plan focuses a great deal of time and attention on education and “life-long learning” as a key objective. Focus is placed not only on youth education but investment in skilled learning throughout one’s career to support flexibility and improved labor force development. The NDP is aligned with their findings and recommendations. On one side of the economy too many employers are unable to find skilled candidates for their openings, while on the other youth unemployment is nearing 40%. These are symptoms of an education system which is not performing optimally.

Though Education is not merely about matching labor to ability, it’s an important consideration. The following charts demonstrate the trends in employment in Curaçao with a tendency towards higher qualified jobs. These trends match those worldwide, where job creation in the developed world is increasingly based in services, and professional areas.

¹² pg 9 Long Term Economic Strategy; LTES Associates, 2013

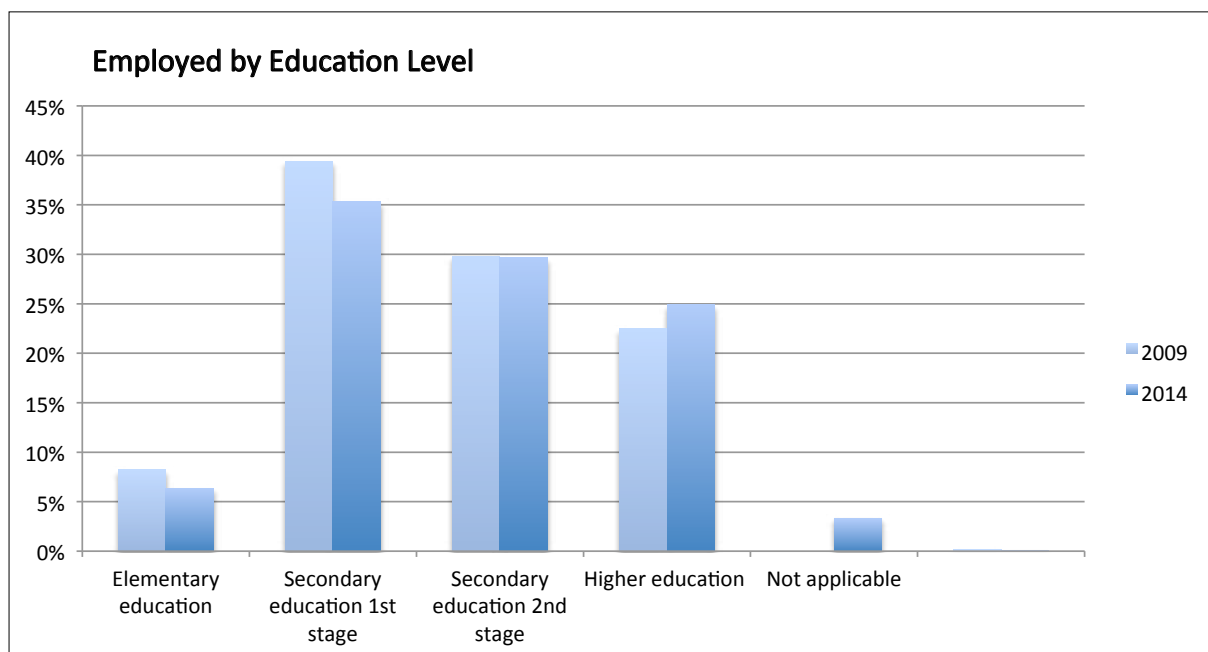


Figure 5 | Source: CBS

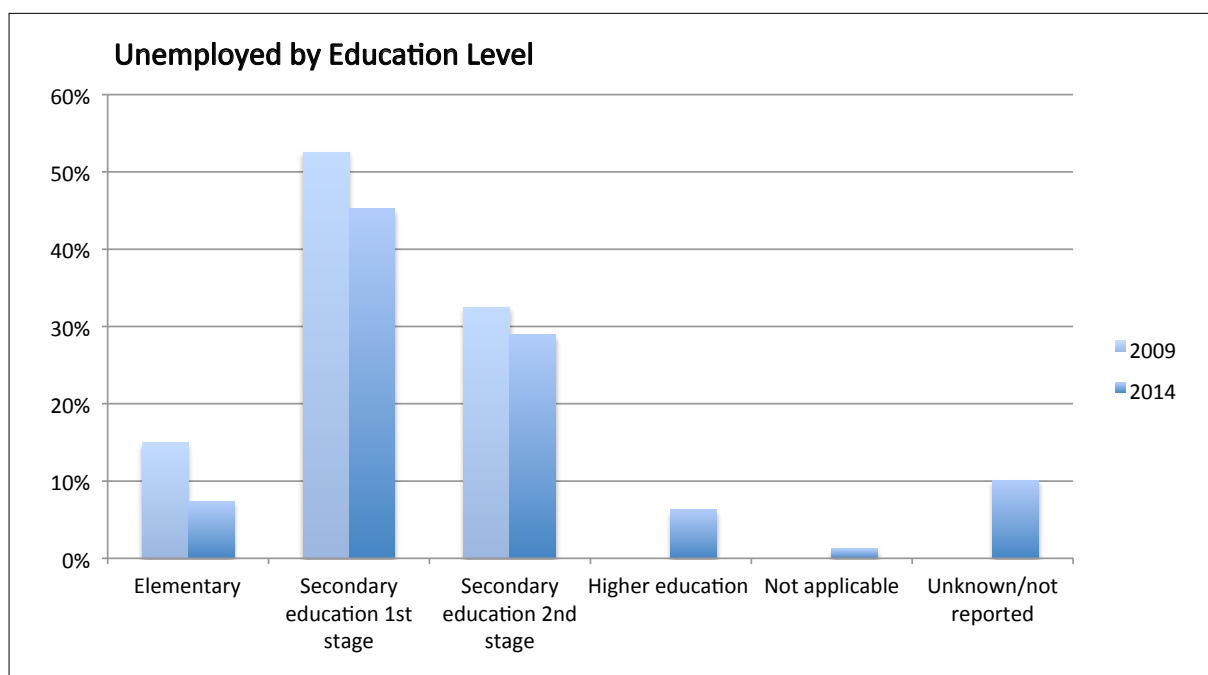


Figure 6 | Source: CBS

Unemployment is trending towards the unqualified segment, with high youth unemployment (37)%. Note that this spike in youth unemployment may be a reflection of policy change. In 2007 the age of compulsory education was raised from 15 to 18, and the affected cohort is now graduating and causing an increase in those looking for employment, and so may be temporary in its level. However, youth unemployment has been a persistent issue for Curaçao even before 2007.

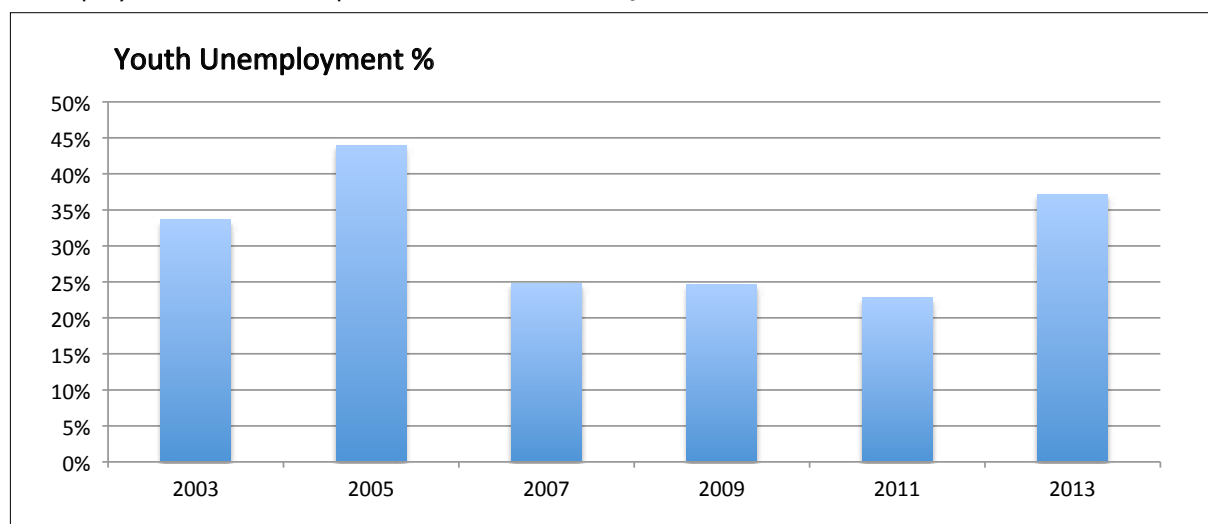


Figure 7 | Source: CBS

The University of Curaçao produced 224 graduates in 2013, while approximately 300-400 young people leave Curaçao each year to study abroad. Interviews have indicated that many of those leaving do not return. Almost as many Curaçaoans live abroad (primarily the Netherlands) as live on the island.

The economy of Curaçao has been producing, on average, 1,000 – 3,000¹³ new jobs per year (since 2007). Many of these jobs are in Tourism, industrial services (within the utilities, the refinery, ship repair, ICT and others) and professional services. Interviews with commercial enterprises indicate that they are each spending hundreds of thousands (some are spending millions) in vocational training, especially for new and young employees. Though all businesses are required to invest in development annually, the interviews expressed frustration with the quality of skills being developed from schools and felt they were having to supplement the education system. An improved vocational system, at the secondary and post-secondary level, would help provide a pool of qualified candidates. And the island of Curaçao has opportunities for vocational skills that most other islands do not have, given its diversified economy. A recent international TVET (Technical, Vocational Education and Training) conference, sponsored by the Ministry of Education and held in October 2015, indicated that though Curaçao has the basis for TVET in its school program, and thus has a good base from which to build, international best practice is not yet in place, including access to technology and complete integration.

¹³ CBS data

Speakers indicated that former practices of shepherding “bright” children into academic streams created a reputational problem for those in the vocational stream. Today the most successful countries are offering technology-heavy vocational programs which are attractive options for all students.

With the trend towards higher qualifications for jobs (whether in professional areas such as Finance, or in the industrial services where vocational qualifications are needed) and the growth in new jobs, the mismatch between qualified candidates and job opportunities is an issue for Curaçao’s future development.

What Will be Done

Education SDG, Indicators and Priorities

Table 3

Goal 4: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all	
TARGETS	PRIORITY PROJECTS
4.1 By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes	Develop a comprehensive Educational Improvement Plan with international experts, incorporating curriculum reform, teacher training, and facility improvements
4.2 by 2030 ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education	Increase the number of places in early childhood facilities. Communication strategy for parents of non-participating early childhood programs.
4.3 by 2030 ensure equal access for all women and men to affordable quality technical, vocational and tertiary education, including university	Focus on strengthening language competencies in three languages (Dutch, English, Papiamentu) Increase the number of students attending and completing HAVO/VWO
4.4 by 2030, increase by x% the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship	Better integrate TVET into school system Increase number of students graduating with vocational qualifications
4.7 By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development	Investment in ICT in school system Ratify and execute new vocational education policy, integrating the academic program with labor market requirements, including establishment of new ROA council Strengthen the supervisory institutions
4.c by 2030 increase by x% the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially LDCs and SIDS	Better integrating the UoC as a component of higher education system Broadening integration of schools into the international network of science Agreement between all political parties on clarity of roles, responsibilities and priorities within Education



Opportunities and Vision

The vision for Education Policy in Curaçao is:

“Every citizen of Curaçao must have equal access to quality education, where they are offered the best opportunities to develop their full potential.”

The mission is:

“Ensure the development, organization and safeguarding of a diversified, high quality and geographically well-dispersed supply of education.”

The vision for the outcome of education in Curaçao is that it should contribute to the development of society and enable people to take ownership of their lives and live together in harmony with each other.

There are strengths to be built on, and issues to be addressed, across the full range of school stages, particularly strategic issues in each of these:

- Early Childhood Education
- Primary Education (Foundation based education)
- Special Education
- Secondary School
- University
- Vocational Training
- Higher Education (University of Curaçao)

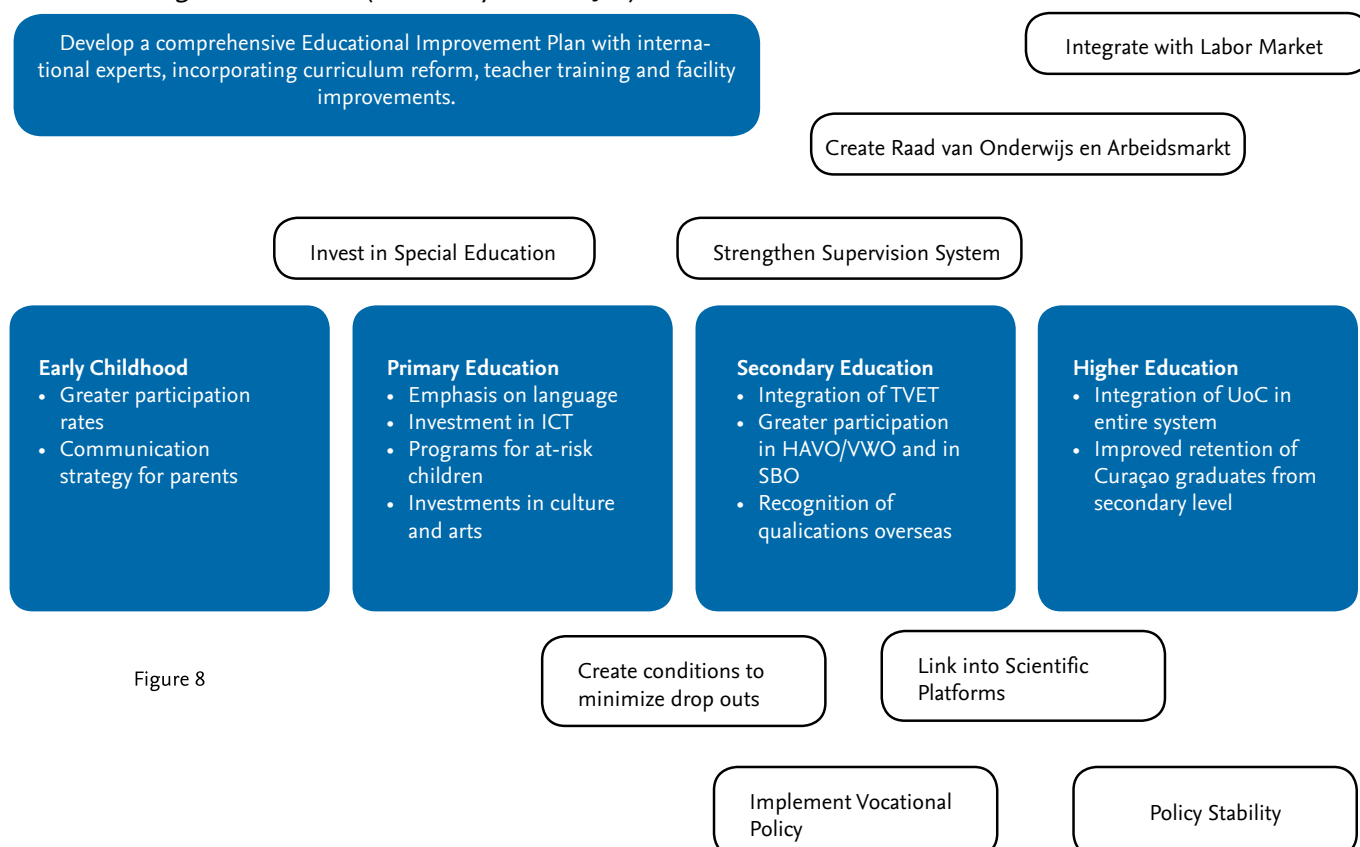


Figure 8

Early Childhood Programs

The Minister of Education, along with its Ministry, has launched a reform initiative in 2014 focused on improving quality and improving Early Childhood Education. The objective is to have places available for every child possible. Though early childhood centres are privately run, the program intends to subsidize low income parents to ensure they can participate. Research from UNICEF indicates there are benefits for children throughout their development when an investment is made in early childhood care, particularly for the disadvantaged.¹⁴

The vision of this program, and objectives, include:

All children under 4 years have access to a childcare center where an adequate program of pre-school education is offered by qualified leaders in a safe environment.

- Increasing awareness
- Offering flexible hours
- Subsidizing low-income families through alternative funding sources
- Supporting alternatives to childcare centres
- Extending the Kaleidoscope curriculum
- Supporting efficient financial operation of childcare centres

The positive results of this intervention should flow through subsequent years of schooling and into the national well-being.

Educational Reform

In addition to early childhood education, there are opportunities for improvement in the traditional school system. Stakeholders and politicians alike have expressed their support for educational reform.

With student numbers reducing, and with aging teacher demographics, there are now opportunities to reallocate the existing budget (currently at 20% of government expenditures and close to 6% of GDP) and existing infrastructure portfolio to offer a more attractive education experience to children.

Education reform is an area for expertise: this is not a new challenge and many creative approaches exist which have proven results.

¹⁴ Preschool Education Policy, Ministry of Education, 2015



This NDP will not presume what the experts will suggest for Curaçao. However the following opportunities are offered as potentially attractive:

- UNICEF has completed extensive research and publications on Child-Friendly Schools, including curriculum and teacher best practice
- World Bank has recently completed a study on what works best in Education Reform.¹⁵ The common themes include investment in practical teacher training and tailoring curriculum to the student. These are not expensive fixes.
- UNESCO has done research on how school architecture can positively impact education outcomes. Given the existing portfolio of school buildings there may be opportunities to sell and build within the capital envelope, leveraging design options which suit Curaçao

¹⁵ 227 studies later, what actually works to improve learning in developing countries?; Development Impact, David Evans, 2015

In addition to improving education results overall, interviews suggested other areas which must be included in the curriculum and/or school system:

- An emphasis on entrepreneurship training. Curaçao as a trading nation must develop a depth of skills in launching and running successful businesses. Teaching, as well as mentoring and incubators (see the section on the Economy) must be part of Education.
- Leadership was also identified as a trait that must be developed and encouraged, through school and elsewhere. The future of Curaçao is dependent on innovation, creativity and risk-taking, as supported by a recent Innovation Strategy Plan from MEO.
- Environmentalism, climate change and environmental stewardship should be included, not only to raise awareness but to raise up the next generation prepared to manage this significant island risk.
- As written in the introduction, Curaçao culture is a vibrant legacy and future investment – dance, song, stories, art, handicraft and other cultural skills – must be supported through development at school. It is also a nation which punches above its weight in the field of sports – increased investment in sports pays off in many ways, including a strengthened national identity.
- Interviews suggested that many students are opting to complete vocational education (SBO and VSBO), but not enough of them leave with a diploma or with enough skills to function well on the labor market. Integration of international best practice in TVET, including investment in relevant and emerging technology, life-long learning and the possibility of upgrading during job performance, presents an opportunity to raise the profile and usefulness of vocational education. More opportunities will be created for those wishing a place in SBO and the Ministry is investigating the creation of a new vocational center.

Post Secondary & Life-Long Learning

One of the themes of Curaçao's development is the investment in proficiencies and accredited qualifications to better match the current economic opportunities, as well as future ones. And to create positive opportunities within the economy that the current brain drain is reversed into brain gain.

The University of Curaçao is well regarded on the island and the region as a hub for learning. However, many students opt for education elsewhere, in more prestigious European and North American institutions. One of the more recent developments in the realm of universities is the presence of trans-national Universities on the island. It's a significant economic player, which started in the 1990s with Erasmus University and has expanded to include 11 providers (including accredited Dive Schools). Three are medical schools, offering foreign students the opportunity to attend a school which provides a path towards hospital residency positions in the USA or other desirable locations.

¹⁶ See also page 11 of the LTES for the report's recommendations for Education reform

Though as yet a small contributor to the economy, it has a disproportionately valuable impact on foreign exchange earnings and net revenue. This is due to the tuitions paid, the residency of the students on the island, and the secondary tourist visits of family members. Note these institutions are not aimed at the citizens of Curaçao. However they have the potential to indirectly improve the reputation of Curaçao as a learning centre, and create a learning hub on the island, with the arrival of qualified

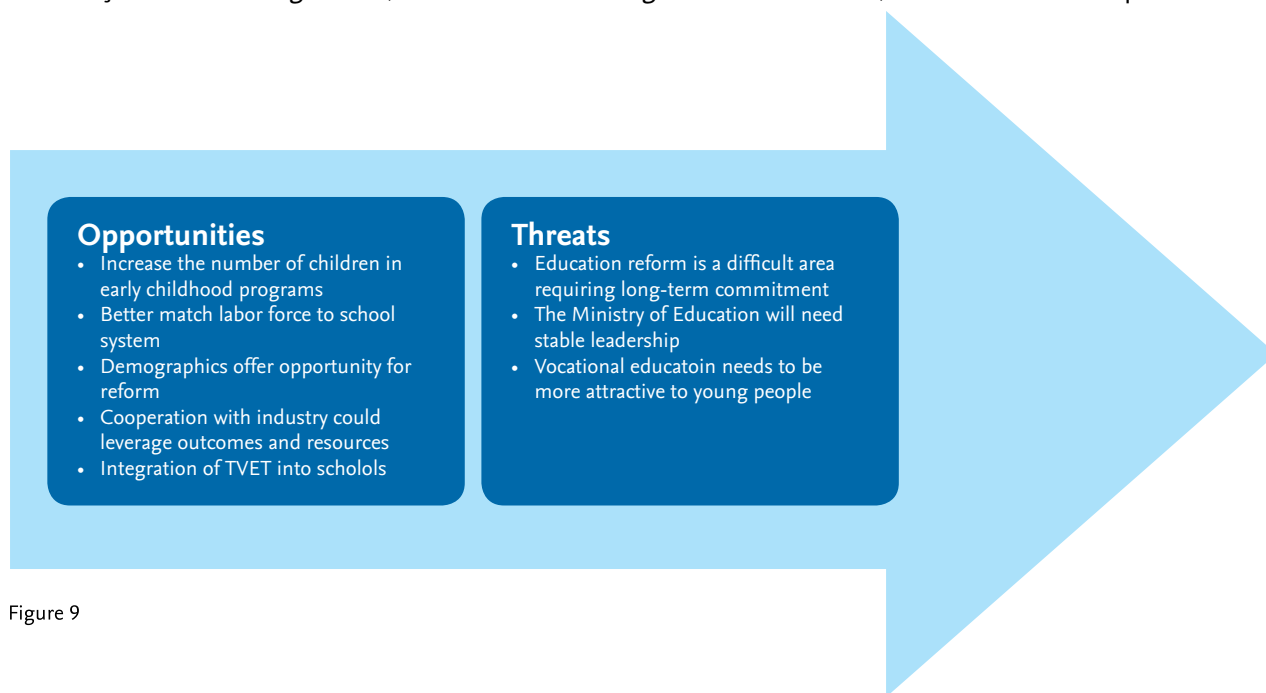


Figure 9

staff, new forms of curriculum and sharing. Its very strengths, however, present a risk to the domestic institutions. Higher salaries and more attractive opportunities may entice both staff and students to leave the domestic institutions.

The economy of Curaçao has an array of industrial services, and qualified (accredited) vocational workers are in demand. This training is provided through a number of schools and government sponsored programs. Ongoing reforms are aimed at strengthening vocational training, including apprenticeship programs. Mechanical training is provided by the Civil Aviation Authority, and the Maritime Centre and Dry Docks offer a range of vocational trainings. Hospitality training is given for the purposes of Tourism and service industries by the dedicated school. However much of this has sprung up organically as needs have arisen. As part of the NDP, the principle of life-long learning, as expressed in the Labor Force Development Plan (a Tripartite Council product)¹⁶ will drive the need for continual updating of skills. There appears to be scope for greater cooperation and sharing of resources, facilities and programs between the private sector and government run programs, particularly those in the industrial services who have common technical and professional skills. Most are spending in the millions of guilders each year in training their own staff.

The government owned entities, including the Refinery, Dry Docks, Aqualectra and CPA, are in the midst of documenting their required skills, and developing a cooperative approach to training and developing staff.

Opportunities and Threats

The Future

The Ministry of Education has outlined the characteristics of the desired future state of Education:

- Good and responsible pedagogical climate
- Good didactical approach
- Basic skills of language, reading, writing and arithmetic versus overall and general skills
- Learning standards for language and arithmetic
- Learning environment with:
 - Efficient and sufficient accommodations
 - Enough inventory
 - Digital learning tools (e-books, video, computer, digital schoolboard, internet)
 - Contemporary/modern methods and material
- Quality care: structured attention for students in need of care
- Methods to measure progress, result, evaluation, tests, influx , through flow and outflow
- A good systems to follow the student, statistical data and information for policy development

Flanking measures:

- National and education language policy
- Policy for student care
- ICT and digitalising education
- Arithmetic policy
- School transport and school breakfast/lunch
- Preschool policy and implementation
- Afterschool programs policy and implementation
- Regular contact with unions and KPEK
- Teachers education courses and teachers assistant (bachelor en masters)
- Professionalising teachers, instructors and lecturers: refresh courses and trainings
- Talent development in schools: sports, arts, culture, nature and environment.

Note that many of these flanking measures required the cooperation and execution by other stakeholders.

The following councils must be active:

- Council for education policy
- Council for education and labor Market
- Papiamentu academy
- Council for Language policy
- Accreditation organisation (local and international)

Supportive Priorities

The Ministry of Education cannot do it alone. Parents, the private sector, Foundations and others, including other Ministries, must be involved at every step. Priorities supportive of a strengthened Education system have been outlined in other ministries:

Table 4

Ministry	Priorities supportive of Education
AZ	<ul style="list-style-type: none"> • National Youth Development Program (cross government)
Justice	<ul style="list-style-type: none"> • Setting up of a bureau HAIT for young delinquents. • Policy focused on effective re-entry of former detainees • Policy focused on the urgent accommodation of undocumented aliens/migrants. • Duty of care for young people (parental supervision), alimony obligation, guidance/coaching towards work, continuous re-capacity/re-ability. • Integrated approach to care in association with the Ministry of Social Development, Labor and Welfare, (SOAW).
Finance	<ul style="list-style-type: none"> • Integral and interactive budget preparation • Identify new fiscal incentives • budgetary framework linked to real/feasible policy priorities through all ministries
SOAW	<p>Families</p> <ul style="list-style-type: none"> • Stimulate the participation of the parents • Policy aimed at effective education support <p>Poverty alleviation</p> <ul style="list-style-type: none"> • Activation policies towards subvention /aid for those entitled • Neighborhood development/active citizens participation • Sustainable social development <p>Youth</p> <ul style="list-style-type: none"> • Policy focused towards prevention/care/safety and protection • Policy focused on reducing youth unemployment <p>Combatting: domestic violence/violence against children</p>
VVRP	<ul style="list-style-type: none"> • Traffic safety • Liveable neighbourhoods • Recreation and green



Economy

Why is this Important?

Employment, wealth, tax revenue, well-being, and pride are all elements stemming from healthy economic development. In the developing world it is often economic development which leads all other development areas, and is usually at the core of “turn-around” stories.¹⁷ Interviews with stakeholders within and outside government have been uniform in their identification of economic growth as the key issue facing Curaçao. One of the strategic SDGs is thus the one focused on economic growth: (Goal 9) Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

Curaçao is fortunate, and distinct in the region, with a range of assets and services within its economy, offering exports in industrial, logistics, financial, tourism and other services, alongside a robust domestic economy. Interviews and workshops with stakeholders emphasized their desire to see Curaçao continue with a strongly diversified economic base, featuring both consumer and industrial services. Though Tourism remains an important economic pillar which should be strengthened, the desire was to see it play a role as one of the range of business pillars, as listed above.

This section outlines the current position, first strengths and then weaknesses of the overall economy in order to provide short-term and long-term direction for economic development. The strengths have been determined through analysis of multi-year trends and a variety of investor reports.¹⁸ The weaknesses, examined one by one, are based on reviews by the IMF and other external stakeholders.

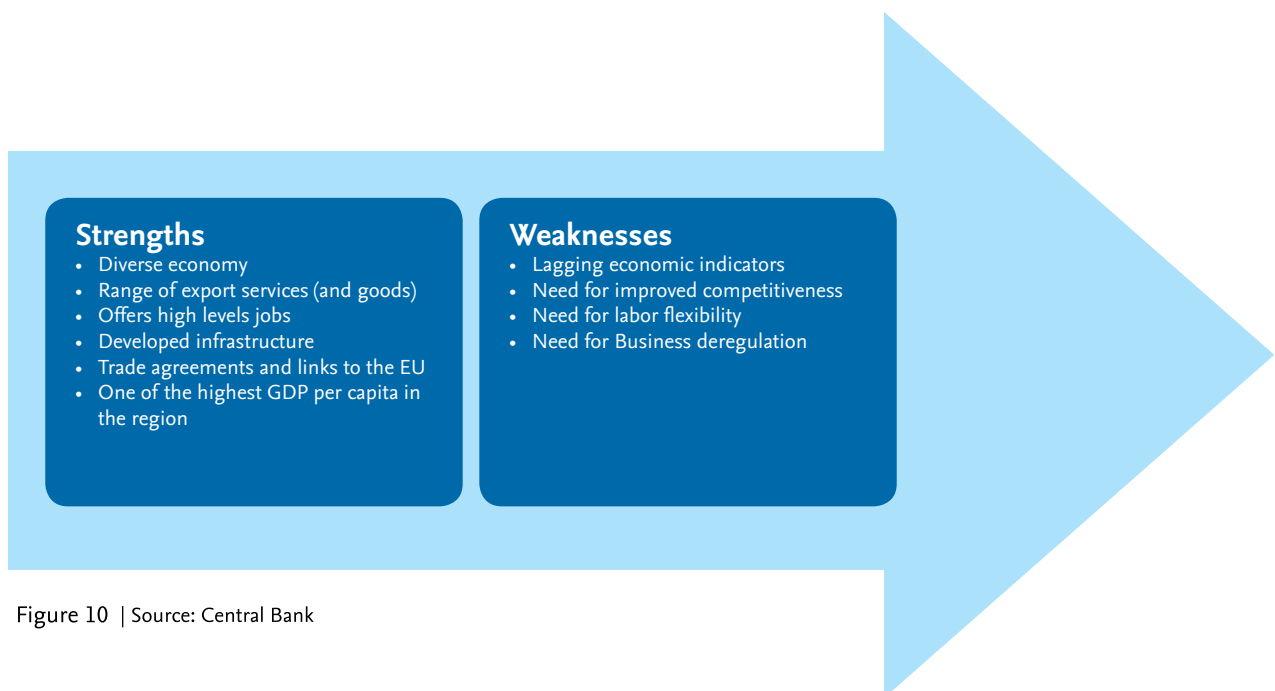


Figure 10 | Source: Central Bank

¹⁷ Examples include New Zealand, Japan, Singapore and China

¹⁸ see Bibliography in Appendix

Though national development is much broader than economic development it is here where early priorities and focus is placed for a number of reasons:

- The economic indicators for Curaçao have been lagging the region's performance;
- Growth in prosperity and government revenue is necessary to fund other development opportunities outlined in the NDP;
- Unlike nations which are dependent on tourism, opportunities for outperformance exist within the diverse economy of Curaçao.

A first glimpse into the strengths of the economy of Curaçao can be seen in looking at the inner harbor.



A cluster of significant export businesses are gathered at the heart of the island. Beyond the core, tourism, financial services and other export businesses have underpinned the economy and offer opportunities for future growth.

Exports

One of the strengths of Curaçao is the range of export services it has in its economy. As with all small island nations, Curaçao is dependent on exports – the ability to generate foreign currency is critical to its ability to finance imports and meet its external debt obligations.

Exports and the generation of foreign currency will be of particular importance for Curaçao during the planning period of this NDP:

- In 2019 the lease of the oil refinery to PDVSA is due to end. Should it not be renewed the impact to GDP and foreign exchange will be significant (4%¹⁹ of GDP or more).
- Also in 2019 the grandfathering provisions to offshore financing legislation will end, potentially impacting foreign income generation from international financial services (worth 201 M ANG²⁰ in 2013, or 5% of total Fx received)
- Debt issued in 2010 will begin to mature, a product of the debt relief arrangement organized with the Netherlands. When debt was forgiven new bonds were issued, and current schedule for repayment (in foreign currency) begins four years from now.
- Finally foreign exchange is necessary as a trading nation, totally dependent on imports. Food, housing material, energy etc must all be paid for by foreign currency. The security of life in Curaçao is dependent on exports.

The following chart outlines the generation of foreign exchange (in ANG) from the various sectors since 2009:

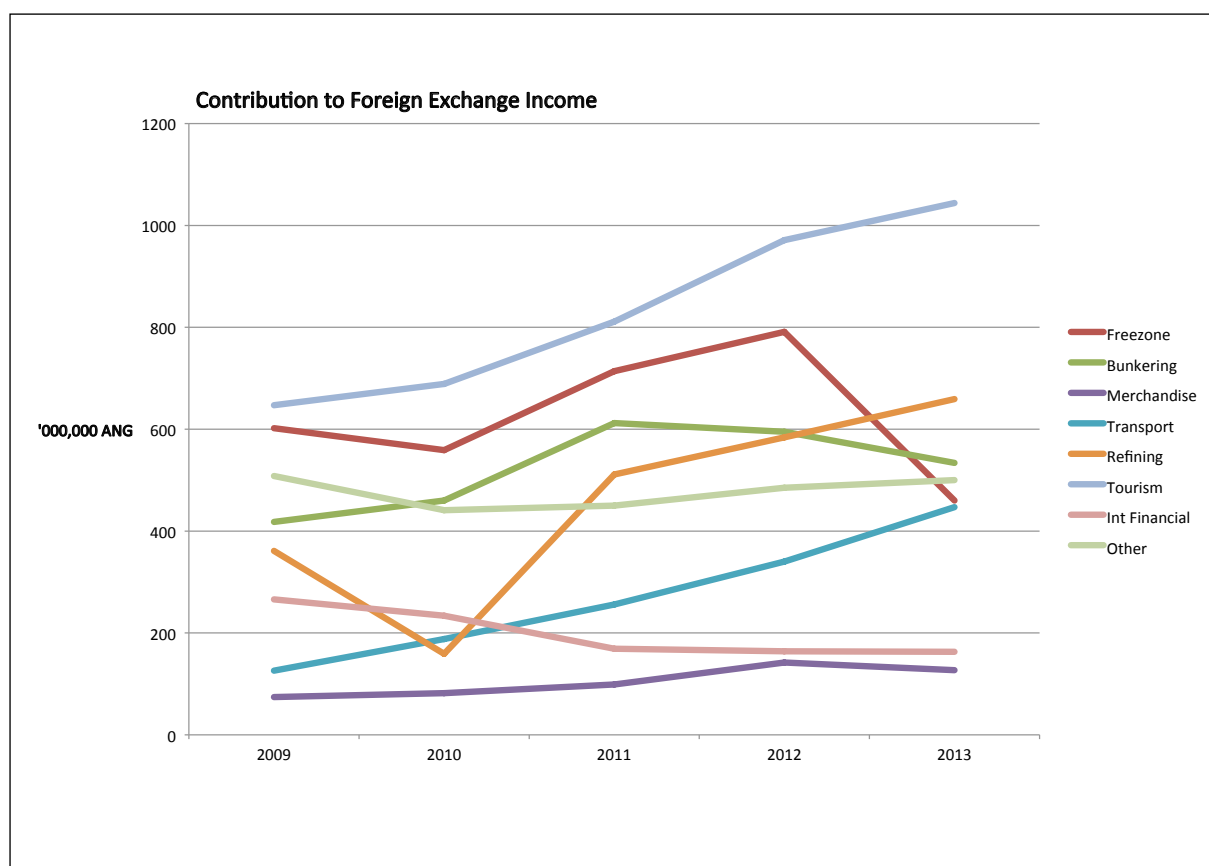


Figure 11 | Source: Central Bank

¹⁹ Figures from Central Bank

²⁰ Figures from MEO

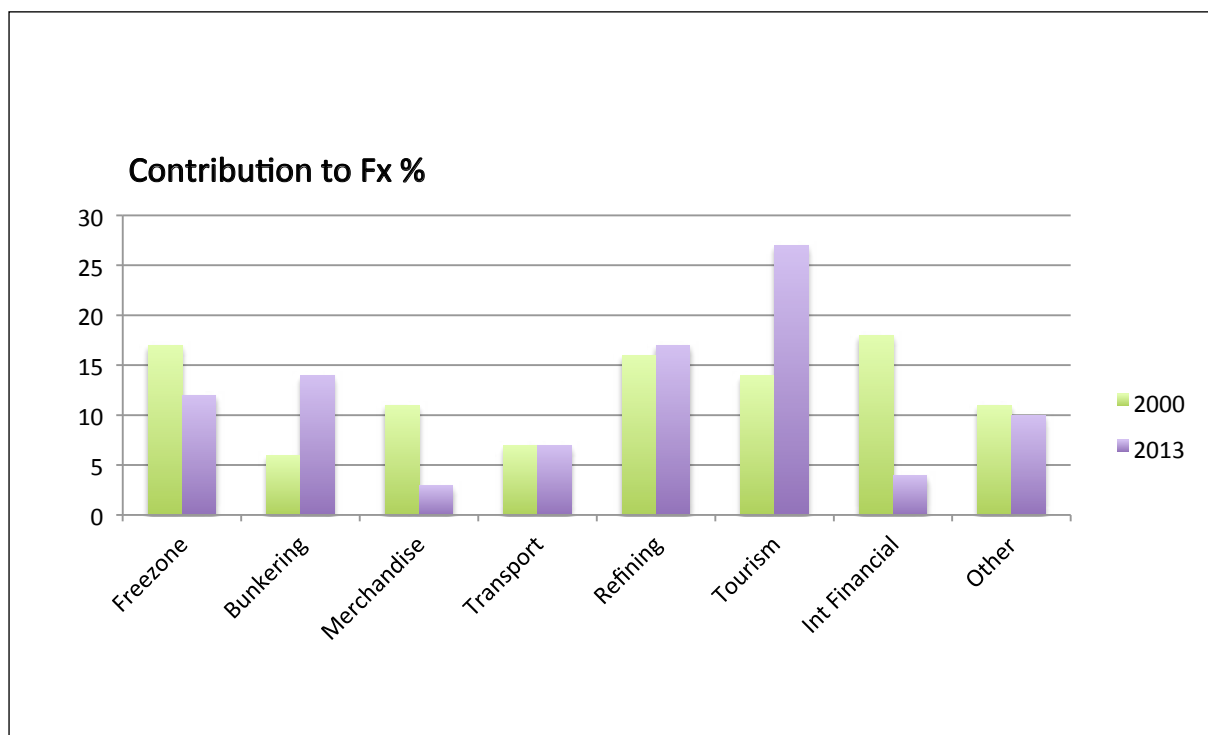


Figure 12 | Source: Central Bank

Contained in these charts are the primary economic engines, in terms of exports, as well as the opportunities for growth. However it's important to note that the foreign income reflected in the chart is gross, and doesn't include the import cost associated with generating each line of income. Though Tourism shows the strongest export growth across the period it also has significant associated import expenditures (food, transportation, energy, accommodation etc, for each visitor) while International Financial Services is considered a "pure" export revenue generator, with few import costs.

Tourism has been growing in gross foreign income, on average, by 13% a year, and the refining fee and transportation (linked tightly to both refining and tourism) have also been rising in receipts. Other economic sectors have either declined or plateaued, though it should be noted that bunkering has increased in volume while decreasing in revenue, reflecting the lower price of oil. If Curaçao is to realize economic growth it must support early focus on the export sectors with the strongest growth and potential while addressing, in the medium term, constraints and conditions required to bring all players in the economy performing to their optimum. Though economic growth in the last five years has been primarily dependent on two sectors (oil and tourism) it will be key for Curaçao to exploit the benefits of a diversified economy with attention to those sectors with potential for growth.

Highest Performing Economic Sectors

In the report of 2013 the Central Bank provided an analysis of the change in contribution to Foreign Exchange income between 2000 and 2013:

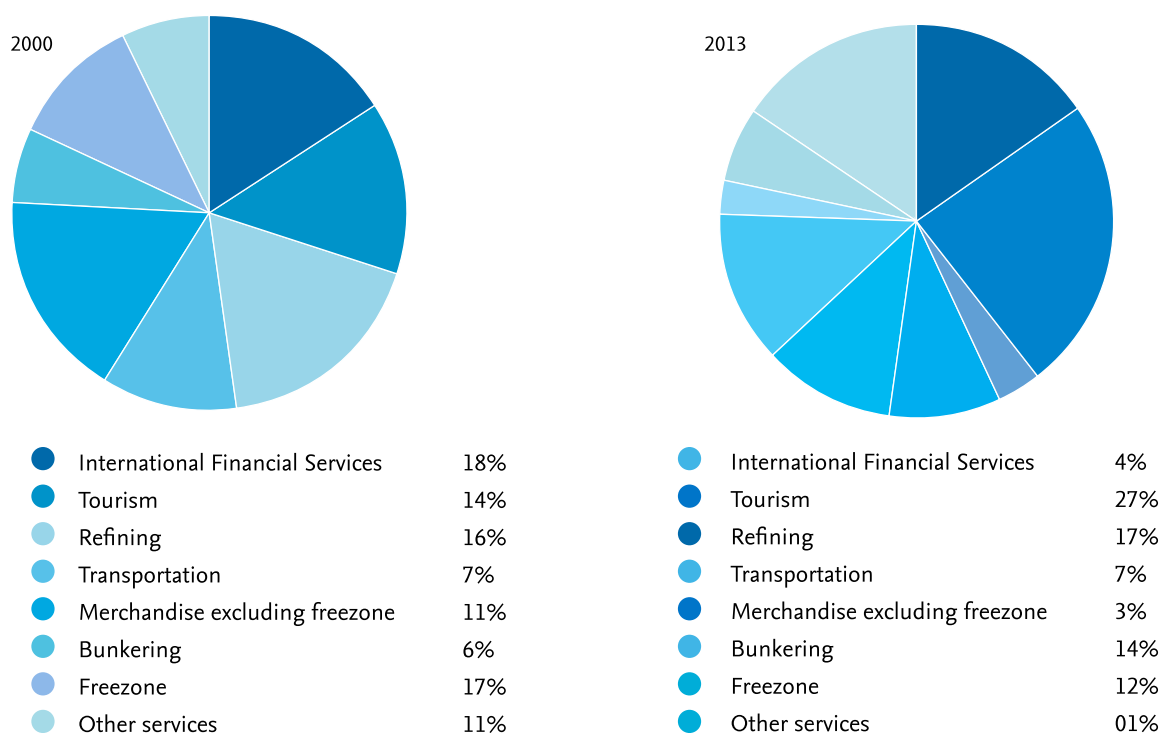


Figure 13

Striking from the charts is the decline in International Financial Services from top place in 2000, replaced by Tourism, followed by Refining and Bunkering. Note that some of this decline is not in absolute revenue, but rather in percentage terms and that IFC has been on an upward trend since 2014. However, the NDP addresses how to build on current strengths, while addressing the potential for other sectors such as International Finance to deliver both “pure” foreign exchange as well as professional level jobs.

Two recent studies provide recommendations on the most attractive clusters for investment (the LTES of 2013 and the 2014 Investment Policy from MEO). These recommendations are covered later in this report.

Weaknesses

If the wide range of export sectors is the chief strength of Curaçao’s economy, it will be able to leverage the potential by addressing some current weaknesses. The most recent review of the IMF was positive in terms of fiscal decisions taken by the government, and on the outlook for growth in the economy, helped by the construction of the hospital and increases from tourism receipts.

However the IMF²¹, along with other external bodies, has identified the following economic issues which should be addressed:

- Increased competitiveness and openness
- Increased productivity and innovation
- Increased labor force flexibility
- Improved business climate and deregulation

When a nation is seeking to introduce economic reform, it has three levers from which to pull: monetary; fiscal; and structural reform. With regards to the first, Curaçao has pegged its currency to the USD; with regards to the second, though there are no doubt some improvements yet to be made, the island has made significant fiscal reforms in the last 3-5 years. The implication contained in this analysis, along with other reviews, suggests that these structural bottlenecks have been at the heart of Curaçao's lagging economic performance. High labor costs, rigid structures, and a degree of bureaucratic red-tape, along with an economy with high capital costs (linked to industrial infrastructure) and too little competition have all contributed. Ministries have each been making improvements in their process streamlining, with more improvements yet to be attained.

These are addressed below.

Economic Indicators

Issues within the economy of Curaçao can be seen in the performance of two key economic indicators. Growth in GDP has been lacklustre, in the words of the IMF, as shown in the chart below.

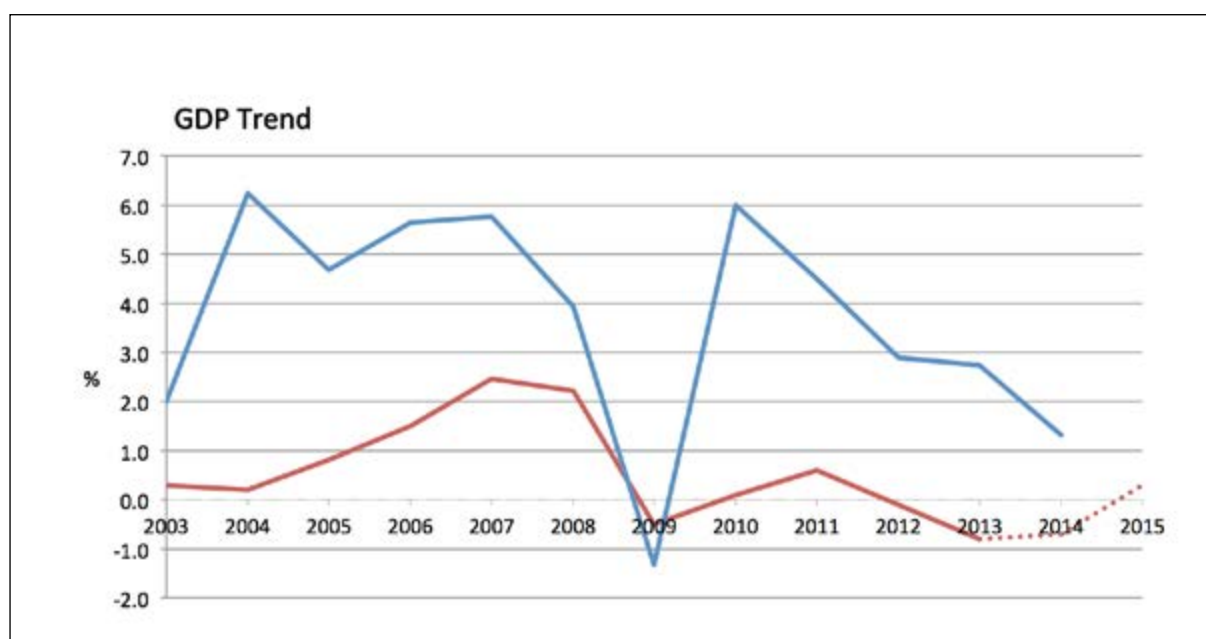


Figure 14 | Source: MEO

²¹ IMF Review, Kingdom of the Netherlands, Curaçao and Sint Maarten, August 2014

In addition to a lagging GDP, the Balance of Payments over the last five years has been higher than acceptable international standards, indicating an underlying weakness in current account balances.

The balance of payment chart for the last three years²²:

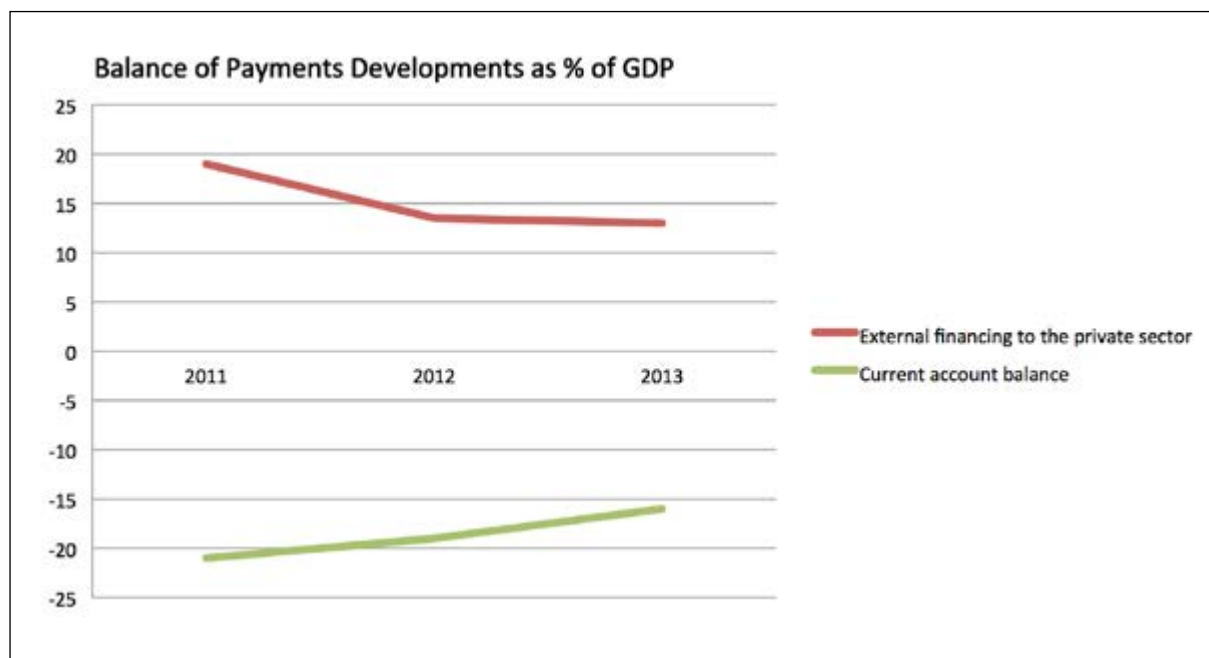


Figure 15

As explained in the Long-Term Economic Strategy report:

For small and open island economies like Curaçao, it is expected that more is imported than exported due to natural barriers common to islands. In turn, to observe current account deficits near 10% of GDP is normal (or BoP deficits). In circumstances where the current account shortfall far exceeds this mark caution is warranted, especially when foreign exchange reserves fall below the generally accepted threshold of 3 months of import cover but also struggle to remain above this mark.²³

Competition & Openness

As with other islands, Curaçao has a small population and a small economic base. Competition in the domestic market is often difficult to introduce and maintain, and being part of a small community adds additional pressure in taking tough decisions. The difficulty of introducing competition and market efficiency, in both domestic and export markets, for small economies has been a subject for study.²⁴ Curaçao experiences difficulties associated with being a small island state in common with other island nations. However the business model associated with tourism, the primary economic sector for Aruba and Sint Maarten, rests upon open trade with the world.

²² data provided by Central Bank

²³ pg 40, LTES, LTES Associates, 2013

²⁴ Competition Law in Small Economies; ICN, 2009

Curaçao, with a range of economic pillars, is not as dependent on tourism, which appears to be impacting its “openness”²⁵ metrics. The measure, which divides imports plus exports over a nation’s GDP, reflects the amount of trade a nation is conducting with the world. The issue for Curaçao is probably less one of openness as it is on imports being higher than exports, putting pressure on the current account deficit.

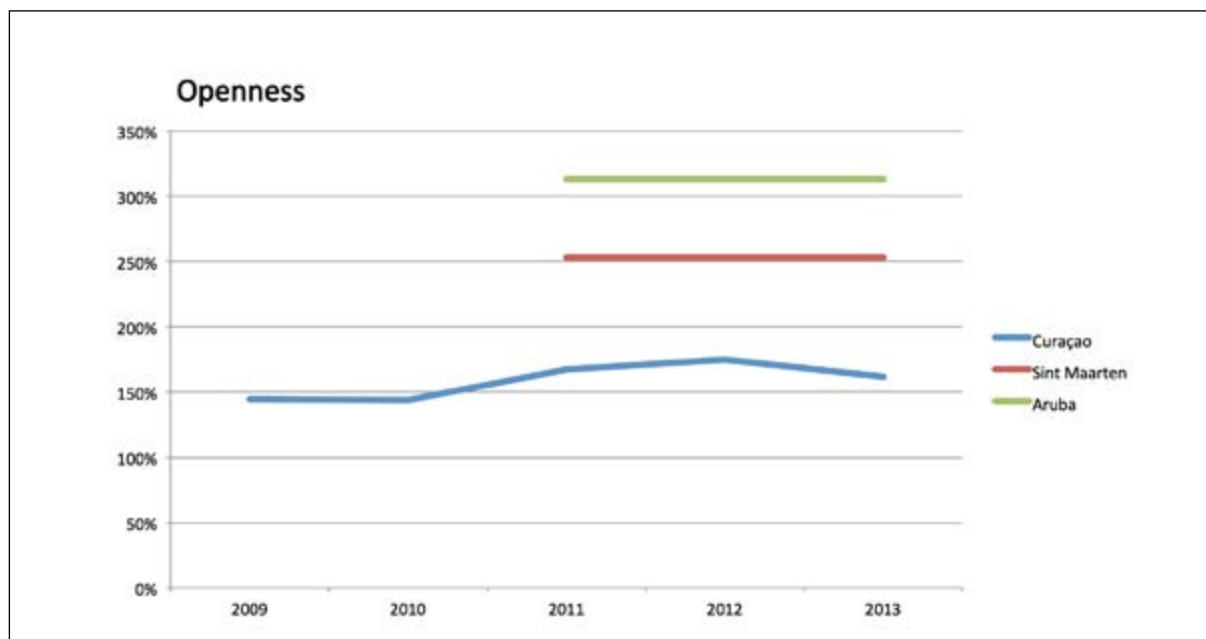


Figure 16 | Source: Central Bank

Curaçao was once the 7th busiest harbor in the world. The opening of the oil refinery by Shell led to the establishment of other facilities – dry docks, bunkering, pilotage – and these businesses exist today. Almost all are government owned companies, and almost all came into government hands when the private sector owner sold and moved on. And most share other common traits: they are, by nature, monopoly services, requiring substantial capital infrastructure. It is therefore extremely difficult to introduce market competition within the domestic setting, and any arrangement with a third party provider (many of the government owned companies have outsourced some services to other providers in long-term contracts) must account for capital depreciation and investment. Either government maintains ownership, through the government company, and must fund capital replacement projects, or the third party takes the risk and responsibility for capital infrastructure. The business model for monopoly businesses, such as utilities, transportation infrastructure (harbor, airport, etc.) is not unique to Curaçao and international models exist which could be emulated. However many other countries have the advantage of a larger pool from which to enter into partnerships and public-private partnerships, an advantage that Curaçao doesn’t have. Tourism has an advantage, compared to the industrial services, in being shaped by competition, both on the island, and with regional and global competitors. The need to meet and beat competitor price and quality helps drive up market efficiency.

²⁵ A measure of imports and exports against GDP; the higher it is the more reliant on trade the economy is.



However recent analysis by the team producing the Tourism Master Plan outlines that Curaçao is trailing its regional rivals in the Caribbean tourism market. This indicates a level of structural barriers within tourism that must be addressed if it is to provide the desirable trading returns. Some of these barriers include branding, labor costs, utility costs and regulatory bottlenecks. Note that many of the barriers for Tourism are also barriers for other businesses on the island.

Greater competition can be introduced through benchmarking against other service providers. And all of the citizens of Curaçao should develop a mindset of “export” and “trade”. Entrepreneurship within the domestic economy is desirable, but it is critical in the export economy. Making progress on this perspective would help both the economy and with national identity and purpose, as Curaçao positions itself as a nation of competitive traders.

Productivity and Innovation

Foreign investors have been reluctant to risk their funds in Curaçao, whether for tourism projects or in the industrial services. Progress reports from the Tourism Master Plan team indicate that ROI on tourism projects has been declining since 2009. The oil refinery has been maintained and upgraded at the periphery since 1918 but is in need of substantial capital investment for modernization (in excess of \$3 B), for efficiency, environmental and new product market reasons. A lack of modernization will result in greater loss of efficiency, revenue and increase in environmental damage.

Equally the harbor services, Dry Docks and airport also require substantial capital investments. How-

²⁶ Tourism Master Plan 2015 progress reports; Tico Croes and associates

ever the global market requires confidence that they will receive a return on their money, and domestic banks, along with international investors, have been slow to take up investment opportunities in Curaçao.

An increase in productivity and innovation rests largely on technology, which in turn rests on investment. Either the government owned companies must generate enough profitability to issue bonds for investment or the global capital markets must be provided sufficient terms and confidence to invest directly into the company. Note in the chart below that a fire at the refinery, along with the utility plant shut-down, impacted results in 2010. Also note that it reflects year over year comparisons and not actual labor productivity levels.

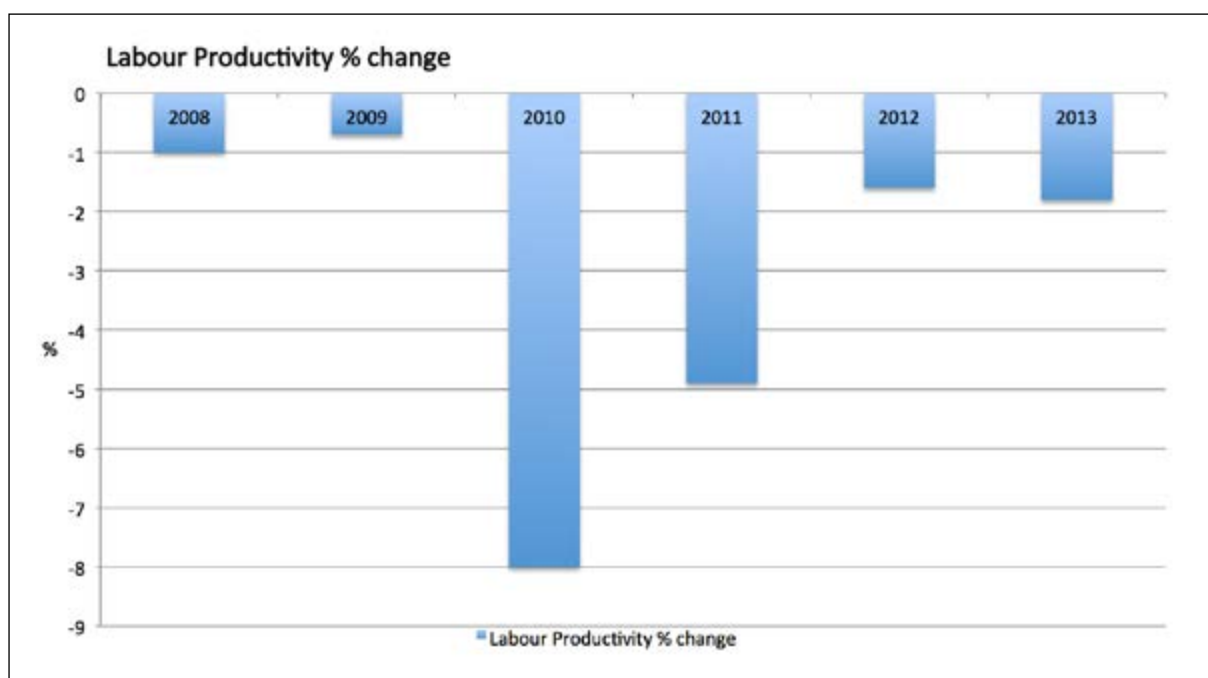


Figure 17 | Source: IMF 2014

Labor Force & Immigration

Unemployment is high compared to neighbouring islands ²⁷, with youth unemployment particularly high. Studies by the IMF and World Bank indicate significant structural barriers, including high wages, lack of labor flexibility (it is difficult to dismiss a worker without a lengthy, government process) and mismatch of required skills to positions.

Language issues are also raised as an impediment – though Curaçao takes pride in being multi-lingual, interviews suggest that the quality of English and Spanish is not sufficient for export related businesses.

²⁷ pg 13 IMF review, August 2014

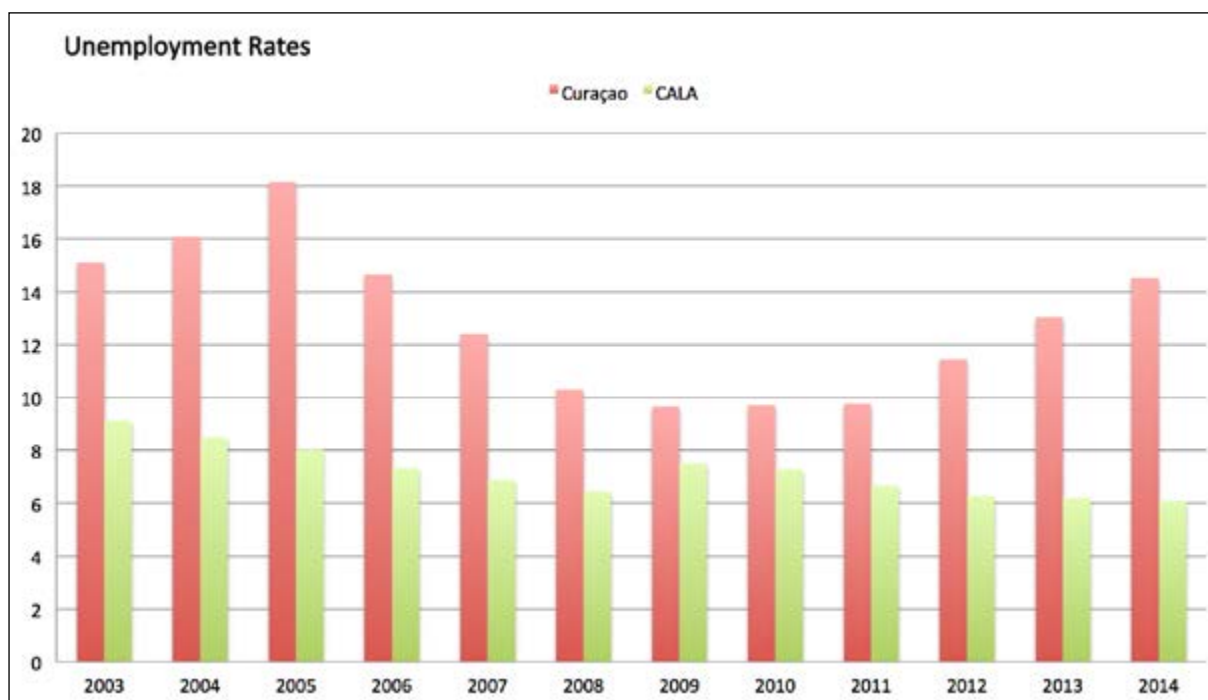


Figure 18 | Source: MEO

The Labor Force Development Plan of 2008 and the Long-Term Economic Strategy both outlined the need for a synchronized immigration strategy linked to labor force requirements, complemented by a more flexible labor force. Current labor legislation has proved inflexible and burdensome. The IMF outlines the need for less rigidity in current labor force legislation and policies, which results too often in short-term contracts rather than full-time positions, as a result of employers nervous of the costs associated with a full-time employee.

Improved Business Climate and Deregulation

Improvements have been made to the issuing of permits and licenses, though the IMF identified this as an area for improvement. Benchmarking against regional leaders would be beneficial: Panama takes an average of 4 days, Chile 6 and Barbados 18. No formal benchmark is available for Curaçao, however anecdotal evidence suggests uneven experience, with some permits arriving quickly, and others taking a few months. However benchmarking should be done carefully: the relationship with the Kingdom of the Netherlands complicates some of these procedures, particularly related to visas.

The other islands do not share this same context. Though there is a task force working now on a one-stop shop, it is focused on eliminating the requirement of the applicant to visit multiple Ministries multiple times. Future improvements will include a reduction in all processes, through legislative and regulatory reform, to eliminate or automate these steps (which will also reduce the opportunities for corruption at each stage). The recent decision to centralize government Ministries in one building should help with the coordinated and automated processes in issuing licenses and permits.

The IMF also cited the need to strengthen the business climate, particularly the governance and performance of State Owned Enterprises (SOEs). The industrial services, transportation and the island’s utilities and telecommunications are primarily owned by government and have been identified as areas for future economic value, should business models and governance arrangements be improved.

What will be done

This section outlines the planned responses to

1. Address structural reform and support economic growth through government initiatives
2. Bolster traditional and future economic areas of strength (export, sectoral and enterprise plans)
3. Invest in supportive public good infrastructure and services
4. Broaden economic debate and decision-making to include non-traditional players, including NGOs, SMEs and the community, both in terms of accountability as well as determining the nation’s economic narrative.



Figure 19

These responses are framed within, and measured by, the economic SDG and associated targets below:

Table 5

Goal 8 Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all		
TARGETS	SDG AND NDP OBJECTIVES	PRIORITY PROJECTS
8.1 Sustain per capita economic growth in accordance with national circumstances and, in particular, at least 7 per cent gross domestic product growth per annum in the least developed countries	Economic Growth Productivity Diversification Entrepreneurship	Government structural reform – Labor Force; Trade Deals; Fair Trade and others Tourism – early priorities include increase RevPar; increase airlift; expand American tourist base; soft skills.
8.2 Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labour-intensive sectors	SMEs Youth Employment Sustainable Tourism	Regulations, policies and support for International Finance
8.3 promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage formalization and growth of micro-, small- and medium-sized enterprises including through access to financial services	Specific to Curaçao's context: Growth through exports Increased competition	Investment taskforce for SOEs for capital infrastructure, PPP options and new markets particularly related to Logistics and Transportation Continued work by MDPT for oil refinery future (including possible LNG terminal)
8.6 by 2020 substantially reduce the proportion of youth not in employment, education or training		Vocational training for youth
8.8 protect labour rights and promote safe and secure working environments of all workers, including migrant workers, particularly women migrants, and those in precarious employment		Entrepreneurship and SME support
8.9 by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes		



This chart has been organized to include the economic SDG and its specific targets, (the first 7 objectives) while adding in two specific targets relevant to Curaçao – which include economic growth primarily based on exports (whether goods or services) and an increase in economic competition.

Another way to portray Figure 18 is offered below, reflecting the need to make progress against the SDG/NDP targets:



Structural and Regulatory Initiatives

The government of Curaçao has an important role within the economy to ensure that the regulatory framework and incentives are in place to support businesses. It also has an investment role, though scope for this has been narrowed through two factors: a tight government budget and oversight from a supervisory board. With the debt relief arrangement made with the Netherlands, Curaçao agreed to financial supervision, through the Commissie Financieel Toezicht (CfT) and constraints on Curaçao's ability to issue independent bonds to finance capital expenditures. The Supervisory Board (CfT) limits what purposes the capital can be used for while in turn the Netherlands provides access to low interest capital. The government of Curaçao has accessed this facility to fund the construction of a new hospital, which is providing construction jobs and a boost to the economy.

In order to better support the economy of Curaçao the government is focused on its role through the following measures:

Table 6

Initiative	Promoting	Actions
Fair Trade Authority	Competition	The policy has been ratified and the draft act is on the agenda of Parliament for a vote and enactment. Budgets, policies, office space have been established and the intention is to begin operations in 2016.
Streamlining Permits	Economic Growth	A few initiatives have been launched, and streamlining permits has already reduced time. Further initiatives will be aimed at cross-Ministerial streamlining, investment in technology and citizen service standards.
Corporate Tax rate	Economic Growth	The corporate tax rate was reduced to 25%, matching the lowest in the Caribbean region, and is slated to be further reduced to 22% in 2016.
Labor Laws reform	Economic Growth and Productivity	See below for more detailed discussion
Diaspora Return	Economic Growth and Diversification	See below for more detailed discussion
Entrepreneurship & SMEs Policy and Capacity Development	Entrepreneurship, SMEs Innovation	The support of a more robust culture for starting businesses and for a vibrant SME sector has been supported through recently ratified policies, capacity development initiatives and communication strategies (including in schools)
Innovation Strategy	Innovation	Newly developed innovation strategy in validation stage. Focused on support to exporting SMEs, collaboration between learning institutions, consultancies, Chamber of Commerce, in developing new products, services and entrepreneurs. Reinforcement of strong sectors (Refinery, Tourism, IFC, Logistics & Distribution, ICT) to accelerate new markets and products.
PPP/Investment Taskforce & Investment Policy	Productivity; Innovation; Economic Growth	Many of the export businesses in the industrial services sector, many related to logistics and transportation, are operating aging equipment and require investments in technology, infrastructure and new markets. Most are government owned entities – an investment taskforce has been proposed to examine PPP solutions. Specific proposals are discussed in the sectoral growth section.
Trade Deals and Bilaterals	Economic Growth and Competition	Curaçao has a number of trade agreements and bilateral agreements, and is a member of the Overseas Countries and Territories, with access to the EU market. It also is a member of the Caribbean Basin Initiative, providing duty-free access of Caribbean goods to the USA. And MEO has ongoing discussions with the WTO about full membership for Curaçao.

Initiative	Promoting	Actions
Youth unemployment	Youth employment	Economic growth is aimed at increasing jobs which local citizens, particularly unemployed youth, may take up. Education, the National Youth Development initiative, policies and training aimed at entrepreneurship amongst young adults are all focused on increasing employment for young adults.
Cinex/Export policy and incentives	Exports, Economic growth	There are incentives aimed at IT centres, tax incentives on inward capital investment, investment allowances, expatriate exemptions on income tax, E-Zones
Airlift and Sustainable Tourism	Sustainable Tourism	Both environmental measures (renewable energy, water management, coral reef protection and ocean management, amongst others) and increased tourism are twin objectives. The newly ratified Tourism Master Plan outlines the support needed from government, particularly in encouraging greater airlift from US markets.

Labor Force and Immigration and Diaspora

In 2008 close to 400 stakeholders collaborated on the Labor Force Development Plan, which was approved but not wholly implemented. It remains the most comprehensive proposal regarding additional flexibility and consideration for labor protection. The reader is invited to read the document for a more in-depth understanding, but the principles include:

- Integrated labor force planning
- Flexi-curity Principles
- Curaçao as Hub of Life long learning for life long employability
- Vision for the talent pool
- Tripartism to achieve the country's goals
- Attention to global warming and environmental issues and
- Synchronization and alignment of laws

These principles were focused on providing improvements in the following areas:

- Productivity and Efficiency
- Incentives
- Temporary and Casual workers
- Retraining and Retrenchment
- Creative Pay Schemes
- Social Programming

In addition to increased flexibility regarding labor laws, a taskforce focused on immigration reform will be introduced in the medium term. One of the tasks of the NDP is to phase reform efforts to ensure government and stakeholders have the capacity to implement. Though immigration reform is critical it is planned to be addressed in the medium term once economic reform and education reform begin to show results and trends.

Encouraging a return of the diaspora is another important investment and initiative. A significant proportion of those living abroad are qualified individuals who could contribute to the fabric of the island, not only economically but in all aspects of community life.

The LTES recommended the following:

- Establish mechanisms to entice the diaspora to return to Curaçao and invest there.
- This means that paper work and permits should be extremely simple and limited to the minimum necessary to ensure proper registration.
- Access to property for residents should be simplified and prices controlled.
- Offer an investment-friendly environment

Since the publication of the LTES policy changes have been introduced to facilitate the return of families with foreign-born children. Growth in the economy, combined with the simplified and business friendly procedures outlined in the NDP should provide the basis both for appealing jobs as well as an easy transition for return.

Sectoral and Enterprise Growth

Government focusing on supportive structural reform, enabling the business sectors to invest in growth lines up with the Long-Term Economic Strategy, which wrote:

*“Since Curaçao’s long-term development strategy will have to rely on the private sector to inject investment in new, emerging and well-established industries, public sector interventions must be focused on addressing market failures and encouraging a business and investment-enabling environment. As highlighted in the analysis in Chapter III, the greatest returns on investment in the public sector will be related to education, but also to reducing red-tape and creating transparency and predictability in the legal, regulatory and policy environment”*²⁸

It went on to suggest that the following economic sectors were competitive and should be supported as early priorities:

“Tourism and travel sectors, green technologies, banking and finance, transport and logistics, and e-commerce”²⁹

In addition to the LTES report, a recent Investment Policy paper ³⁰ was published by MEO for CINEX (Curaçao Investment and Export Promotion Agency) in 2014 and contained the following supply/demand analysis:

Table 7

Demand \ Supply	High	Medium-High	Medium	Medium-Low	Low
High	ICT			Energy	
Medium-High	Tourism				
Medium	Financial Services				
Medium-Low					
Low	Logistics and Distribution			Creative Industries	Marine Services

And made the following recommendations³¹ :

TIER ONE: Proactively target and develop individual sector collateral documents for Tourism, and for Financial Services. This combines two sectors which are the largest on the island, each with high potential, and combine both a high volume, and high quality range of jobs.

TIER TWO: Reactively support Logistics & Distribution, ICT, and Energy but continue to monitor the development of these sectors over the next 2-3 years, such that one may become a greater opportunity. Develop sector collateral etc.

²⁸ Pg 203; Ltes, Ltes Associates, 2013

²⁹ Ibid

³⁰ Pg 5 Investment Promotion Policy And Strategy; Meo, 2014

³¹ Pg 6, Ibid

TIER THREE: Alongside all other sectors, reactively support Creative Industries and Marine Industries, should there be inquiries from investors.

On its website it lists ten investment opportunities³² within the economy of Curaçao, a testimony to the depth of choices within the diverse economy, while the policy recommends a tiered approach to support and promotion for Foreign Direct Investment (FDI).

Both the LTES and the Investment Policy recognize the strength, and potential, of Tourism and International Financial Services, and to a lesser extent ICT and renewable energy. An analysis of trends in gross foreign income generated support Tourism and Refinery Services as strong performers.



Figure 20

The strategy of the NDP is based on the recommendations of these studies, and summarized as:

- Support the most competitive, high value added, strongest Fx earner(s) and job creators in the short-term (Tourism and Financial Services)
- Improve business environment (regulatory and legislation) impediments immediately
- Invest in skills and labor force (through Education and through return of diaspora) (begin immediately, though this will be a long-term initiative)
- Address competitive and governance issues in medium-term through new business models and external disciplines
- Maximize potential of diverse economy in the medium to long term (Tier Two and Tier Three businesses, along with emerging opportunities)

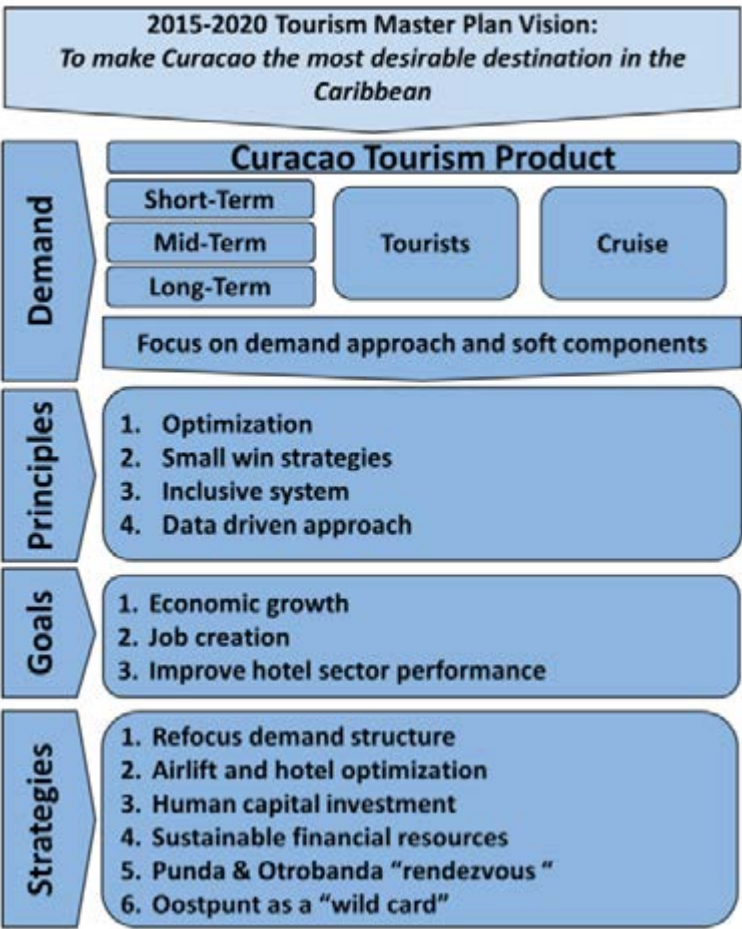
³² Tourism, Financial Services, Oil Refinery and Renewable Energy, ICT, Logistics, Trade and Distribution, Manufacturing, Cultural and Creative, Transnational Education, Economic Zones

The urgency is to build in a measure of resiliency through early success with Tier One sectors, while allowing the time needed to tackle more complex economic decisions. The LTES report projected an impact of 2.5% growth in GDP³³ (an improvement over the baseline projection of 1.7%) should these economic interventions be pursued.

Tourism & Airport Authority

Tourism is an important economic pillar to each of the Caribbean islands, and Curaçao is no exception. The economic impact of this sector in 2014 was estimated to be \$419 M USD³⁴ , and foreign exchange income has grown an average of 13% per annum over the last five years. Between 11,000 and 13,000 jobs are associated with Tourism (around 20% of employment). Tightly connected to Tourism are both the cruise industry (the Harbor Authority and the mega-pier(s)) and airlift, and the airport authority (CAP). The latter authority is covered within this section. The CTB has finalized, and the Council of Ministers ratified, the 2015-2020 Tourism Master Plan, whose implementation is underway. Though new airlift is generating more stay-over tourists³⁵ (452,000 in 2014, an increase of 11,000) Curaçao has room to improve in terms of ADR (Average Daily Rate) and RevPar (Revenue Per Available Room). ADR is 25% lower than the Caribbean average, while RevPar is 23% lower. ³⁶

The goals, and strategy, of the Master Plan are summarized in this diagram from their document:



³³ pg 6 Long Term Economic Strategy, 2013, TAC Consultants
³⁴ pg 15 CHATA AGM, 2015
³⁵ pg 17, ibid
³⁶ CHATA AGM report, 2015

This will provide for an additional 4,000 to 5,000 jobs to the economy from a more vibrant and professional Tourism sector within five years, and 2% growth in GDP. Though some would argue that Tourism only provides low level jobs, there is scope to develop valuable entrepreneurial skills and could be a good entry point for unemployed youth, if they are able to access training in the requisite skills. Of more concern is whether there is interest to take those jobs, whether a niche brand is possible amongst a crowded Caribbean economy (the entry of Cuba into American tourism could prove a significant development), and becoming too reliant on a cyclical and vulnerable sector. The good news, however, is that Tourism has become the top performer in gross foreign exchange income for Curaçao and with a little attention and improvement could greatly assist the short-term financial goals. Some care is needed in interpreting the benefit of Tourism Fx, however. The import costs are high in this sector, and net FX must be managed carefully. All-inclusive resorts, self-contained apartments, and low spending tourists will all reduce the net benefit of their limited FX spending (in fact all inclusive resorts have a model where all the payments are accounted for outside the island, while all import costs are borne here).

Government, and the tourism industry, will need to implement with determination and urgency. Government will be focusing on airport and airlift improvements, education (Hospitality School and other vocational training), regulatory reform (making permits and visas more streamlined), utility reform (reducing the costs of running a business) and institutional support (CTB and increased room tax collection). The increased budget for CTB is expected to be derived from a more efficient collection of room tax, but the Master Plan asks for a \$40 M USD government load, to be repaid through the room tax, with the details of repayment schedule to be worked out.

Reform and investment in public transportation (VVRP) is key, allowing local workers access to jobs with more reliability than the current system allows. This will require the Ministry of Transportation to finalize new policy and arrangements with providers, an initiative currently underway. A focus on developing Punda and Otrobanda as the destination core requires the cooperation of VVRP in terms of land use and neighbourhood development, along with the support of CPA (which has plans, outlined later, for development of Waaigat and St Anna Bay as a marina and tourist/services/neighbourhood destination).

A number of projects, both private sector and public sector, are underway which will support a better tourism experience, including the development of the Marie Pompon beach and area. Proposals exist to invest in Punda and Waaigat, as well as in a yacht marina. These will be supportive of tourism added value, should they be realized. Most have been in the pipeline for a number of years, and are subject to the availability of risk capital. Improvements in the ease of doing business, labor flexibility, increased competitiveness and policy stability should encourage investors and may be supportive of these projects.

In addition the CPA has received approval for the construction of a second Mega Pier, to begin in 2015/16 once environmental and land permits are obtained. The second pier will increase tourism visits and spending on the island, projected to increase from \$600 K USD per year to \$1 M (or per capita spending from \$72 to \$100). Construction is expected to begin in January, 2016, completed in the first quarter of 2017, at a cost of 90 M USD, to be funded through an \$8 USD cruise passenger “head tax”.

The Airport Authority is an example of an innovative Public Private Partnership (PPP) where government has entered into a 30 year concession through a Development Operation Management Agreement (DOMA) with a consortium of private partners. Government receives a percentage of all revenue generated by CAP, through passenger fees, concessions and other revenue generation. CAP has invested \$100 M in airport improvements and has phased plans to expand the airport, including a new arrivals terminal, commercial plaza, immigration hall and expanded departure lounge, in a \$36 M USD capital investment program. There are 1870 airport staff and 5760 airport-related jobs, with CAP providing 6.5% of government income in 2014.

This model provides an alignment of incentives along with external oversight and standards, particularly from the international airport industry. Currently Curaçao is working on regaining Category 1 status (it has Category 2 status) which is related to the institutional strength of its Civil Aviation authority and regulatory framework.

CAP, working in partnership with government, will need timely support in the areas of building permits, fee structures, Immigration staff and process, strong tourism branding and marketing, and a continued transparent and supportive partnership with political counterparts.

International Financial Services

This has been a traditionally strong economic player in Curaçao, contributing 12% of GDP in direct and indirect value, and 5,000 employees. In 2000 it was the lead contributor to gross foreign exchange income but with tighter international scrutiny and legislation, it has declined to 4% in 2013, though trending upward in 2014.

However, as mentioned earlier it generates “pure” foreign income, and thus its 7th place in generating foreign income (compared to other sectoral pillars) is likely much higher if net foreign income was the basis for comparison. As well it requires high value added jobs, attracting professionals to its ranks.

The International Financial Services Sector (IFC) has identified five products which will lead growth in the near future. They are Investment Funds, Segregated Cell Companies, IP rights, Shipping Registration, and Aircraft Registration.

CIFA (Curaçao International Financial Services Association) represents the industry and acts as a liaison with government. One of its mandates is to represent the industry internationally, and has a key objective of ensuring Curaçao is recognized on the “white list” (i.e. those countries deemed to be acting in accordance with international requirements for money laundering, tax evasion and other illegal financial activities).

In order to generate more revenue and more jobs the industry requires support from Government in two areas: legislation reform specific to the IFC products and more general business environment support (ease of permits, licenses, and visas as well as lower cost of doing business).

In terms of specific actions required by government the industry is seeking harmonization of current laws, based on older Dutch legislation, with the international laws, in addition to an extension on the number of tax treaties agreed with other jurisdictions.

Refinery & Curoil

The refinery is both a strategic as well as an iconic (and divisive) asset. With the impending lease deadline two Multi-Disciplinary Project teams (MDPT) have been established to provide advice on the future of the Refinery.



The two primary options provided by the teams include renegotiating a lease, including the necessary multi-billion dollar investment into retrofitting the refinery. The other team has investigated scenarios based on the closure of the existing refinery, clean-up (also multi-billion dollar cost) and redevelopment as a residential, tourist and commercial centre. Variations include a much smaller and environmentally improved refinery along with a residential and commercial centre, or focusing only on storage and bunkering at Bullenbaai. The most economical and profitable scenario is the hybrid solution, involving redevelopment alongside a modernized refinery.

Direct employment has been reduced to approximately one thousand employees, but benefits include indirect employment, Fx, and tax revenue and the direct and indirect contribution to GDP. The Refining pillar generated 4% of gross foreign exchange income in 2014, totalling 737 M ANG.

Few interviews suggested that the majority of citizens and stakeholders support a future without the refinery, for reasons of employment, GDP, Fx and history. Many families have multi-generations who have worked at the refinery. However most recognize that ongoing operation of the refinery has an impact on the environment.

Whichever scenario is selected for the refinery, there will be additional employment and revenue for Curaçao, with a potential influx of temporary workers requiring housing and services if closure and clean-up is selected (in excess of 4,000 temporary jobs). Of greatest risk is the community division associated with either decision, along with (of course) the financial and environmental risks.

The refinery has recently entered into a strategic partnership with CPA, (the Port Authority) and Curoil, through a letter of intent, to develop a deep sea port at Bullenbai. Curoil has intentions of building an office, LPG storage and pipelines, through leasing the facilities from the refinery. Greater capacity for bunkering will be possible, along with protection of fuel supplies for the island. Curoil's part of the project will take five years to complete, financed through a syndicated loan of \$122.6 M ANG. There will be 10-12 new direct jobs, 25-50 temporary jobs. It will also contribute towards a more environmentally sustainable Curaçao. The refinery is investing \$500 M USD towards the LNG terminal and use of LNG as the refining fuel. Operation of the new LNG terminal will create an additional 300-500 permanent jobs in the refinery.

In making a transition to LNG the refinery is projecting the following reductions in emissions: NOx 92% lower; COx 22% lower; SOx 99% lower; Particulates 98% lower; Heavy metals 99% lower; Greenhouse gas 20% lower. This not only improves the economic value of the refinery, and markets for its products, it helps Curaçao meet global climate change objectives. It will also extend the life of the refinery for 20-30 years, allowing Curaçao more time to decide if oil refining will remain an important economic pillar or to transition in a measured and controlled way, without sudden shocks to GDP or foreign exchange accounts. As of November 2015 the Refinery teams reported 16 potential investors in the refinery opportunity and 18 in the LNG project. The LNG project is progressing, with a tender to be issued within the month, a decision on the desired partner by May 2016, and project financing to be in place by fourth quarter 2017. The investments will fund the construction of the terminal, pipelines, new gas units for the refinery (transition to new fuel), along with upgrading utilities, new roads and new training facilities.

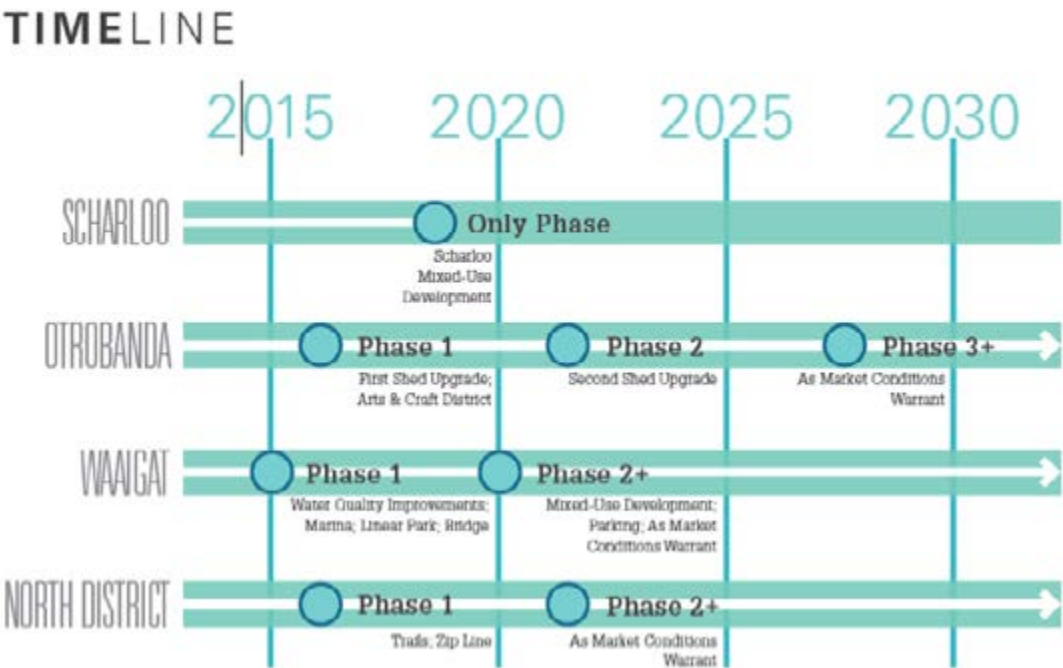
CPA and CDM

The Harbor Services and Dry Docks, are both government owned companies with significant capital assets, third party providers, and the need to invest in new technology and infrastructure. Dry Docks (CDM), has been long established in Curaçao and has ambitious plans to broaden its markets in four areas: ship repair; ship building; ship dismantling; and offshore warehousing and distribution (primarily for oil and gas). To meet its, and the region's, training needs it will also be home to a training school offering the range of skills needed by the organisation.

It has revenue of 84 M ANG but under its diversification plan projects this could rise to 125 M ANG. The diversification plan would produce 1150 new jobs (on top of a current base of 526) and requires capital investment of 42 M ANG for short-term CAPEX and building of a third dock for ship repair. Further investments would be needed for the diversification plan, which will require a strategic partner. Two significant barriers have been removed for outside investment: a long-standing claim against the company has been settled (this claim had impacted the number and size of ships which were willing to do business with CDM) and outstanding financial statements have been prepared and submitted for audit opinion. CDM, along with government, are now in a good position to negotiate with potential partners on the conditions under which a partner would be willing to invest.

CPA also has a vision for the future markets and services associated with the ports and Harbors of Curaçao. The plans surrounding Bullenbai have been covered earlier in this chapter, as have the plans for a second mega-pier. In addition to these two significant projects, CPA has outlined development plans for Waaigaat and St. Anna Bay, and has put out a tender for the redesign of the area into a mixed commercial, residential and maritime hub, offering tourist experiences and yachting facilities. The development of this area requires the input and cooperation of most government agencies, including utilities, transportation, policing, urban planning and permits, downtown merchants, tourism authority and others.

The CPA Master plan outlines a phased approach to developing four key areas (St Anna/Waaigat; Scharloo; Otrobanda; North District). The timing of the developments will be dependent on willing investors and government permits. Should the entire Master Plan be realized through 2030 there will be 1,600 temporary jobs and over 2,000 direct and indirect jobs, and an additional \$93M in revenue.



³⁷ from CPA website, November, 2015

The newly approved Harbor Policy outlines the choices for governments regarding business models: private sector; landlord (providing basic infrastructure only); tool (providing the capital assets such as cranes); and service (where government provides all, including labor). Curaçao currently resembles a tool port, with a mixture of business models split between CPA (the SOE) and CPS (the outsourced third party provider of operations). The CPA also provides nautical services through other government SOEs (KTK and CPO). The Harbor Policy recommends an orientation of the role of CPA towards safety and public good and a migration towards being a landlord port, rather than tool port.

These governance and business decisions pertain to all the SOEs (exporters or not). What is the most effective role for government? What is the best deal that can be arranged with monopoly providers? Who is responsible for capital investment and maintenance? And on what basis are decisions, and contracts, made, representing a fair distribution of risk and reward? And how will the public know if such equity has been realized? Decisions like these are not new, are difficult even in a large economy, and extremely difficult in a small economy. An investment task force, highlighted as an early priority for the implementation of the NDP, will need to examine the role of government as owner, operator and/or regulator in a number of businesses, including CDM, the Refinery, CPA and others.

Discussions with each of the SOEs highlighted three common areas for improvement and support from government:

1. An ownership and governance model (such as PPP) which would optimize the opportunities for private investment;
2. More timely and effective responses on permits, visas and other government decisions required for business operations;
3. Access to more skilled employees and better vocational training.

And for some, requiring regulation, they would add in a more effective regulatory and pricing framework.

There are initiatives proposed in each of these areas to ensure the best chances for economic growth. An investment taskforce for SOEs could address common concerns, while eventually providing for tailored investment arrangements for each business.

Other Economic Players

As stated earlier, Curaçao is blessed with a range of businesses, mitigating its economic risks through diversification. The report has outlined in detail a number of master plans, growth strategies and investment requirements of a number of them, and the table below provides a summary of other business opportunities:

Table 8

Sector/Business	Potential
Freezone (Curinde)	This government owned company acts as landlord to a range of businesses operating in a tax-free to produce export goods meant for other destinations. It has recently introduced new standards for businesses, the value and quality of its products. Its primary goods destination is Venezuela, but Freezone's strategy is to broaden the market's base.
ICT	Curaçao has one of the region's best cabling and internet service and has been home to a large Data Centre, CTEX. Curaçao also hosts a number of online sporting enterprises. The LTES identifies ICT as a potential growth sector, building on the attractive infrastructure and the cluster potential of skills and businesses.
Renewable Energy	Aqualectra has invested in third party operated wind farms, and in solar energy, and the EU has proposed a fund to help support the development of further renewable energy projects. These are covered in more detail in the following chapter.
Creative Industries	North Sea Jazz Festival has been a huge success and economic boon to the island, and is an example of the potential for the arts and other creative industries. Curaçao punches above its weight when it comes to world-renowned artists, musicians, sporting figures, and others, and this field, supported by greater investment in entrepreneurship skills and small businesses, can become a powerful part of the exports from the island.
Others	The future, especially in an age where the internet has shrunk distances, borders and organizational structures, will hold a range of business ideas unimagined at this point. What is sure is that for these businesses to thrive the government needs to provide a nimble, enabling environment.

Based on existing master-plans, job growth in Curaçao will be substantial, should the enabling environment and investments transpire. The following chart is based on sectoral master plans³⁸, which reflected substantial investment in public-private partnerships. The more likely scenario will be more modest, but each economic pillar has the potential to generate much more employment if the economy could be better managed, and more nimble.

Table 9

Jobs	Sector	Time-Frame
1,500	Multiple – CDM, Government, construction (1,000 jobs for 1,000 youth program)	present
5,000 +	Tourism, IFS, emerging economy	2016 onwards
10,000 +	Maritime and Refinery	Late 2016 onwards
3,000 +	Domestic spin-off	2017 onwards
18,000 of which 10,000 permanent		

Note that these are increased jobs on top of the normal growth rate in jobs. The building of the hospital introduces trades and construction jobs, mostly of a temporary nature, while the training and hiring of additional staff at CDM, associated with the SOAW “1,000 jobs for 1,000 youth” program is primarily replacing retiring workers. In addition MEO, SOAW and Education have combined forces to create a permanent Vocational Training School, to be opened in 2016, focused on the range of skills needed for the industrial services of Curaçao, including CDM, CPA, the Refinery and others.

Associated with this growth in jobs is a project growth in GDP in excess of 5% (2% from Tourism alone).

The creation of jobs is likely not the most important question facing Curaçao. It is, rather, who will take these jobs – can the proper skills be introduced into the existing work force, or will immigration be required? And if immigration, can it be controlled or will the country face pressures from uncontrolled entry? This NDP is based on multiple, yet focused, initiatives which must support one another, such as Education reform, phased economic reform, and labor and immigration reform.

The following section outlines the government investments, and actions, which will support the achievement of this economic growth.

³⁸ the sectoral master plans projected job growth based on maximum PPP investment in CAPEX, representing the most optimistic scenarios with each business/sector

Supporting Measures

The commercial sector has their master plans, and government has a range of regulatory and structural reforms underway. Government also has a role to play in the following:

- Government investments
- Government as owner of commercial enterprises
- Government to ensure growth is inclusive and sustainable

Planned investments by government are primarily directed towards public good projects, in infrastructure and services, which will attract investors, provide for an inclusive, equitable and healthy populace, and will make Curaçao a good place to live.

The most significant capital investment in the current budget is the construction of the new hospital, with other capital investments planned for road construction, government buildings, and minor capital for schools and community centres.

In the medium term, however, government will need to be prepared to fund investments supportive of the economic and national strategy, focused primarily on public good assets (schools, housing, transportation, and indirectly in the utilities owned and managed by government companies).

The most strategic investments will come from the private sector, and so the most effective investment to be made by government will come in the form of regulatory changes, a more stable political environment, and a clear economic strategy, to provide confidence to those willing to risk their capital to choose Curaçao.

With government focused on public good assets, and the private sector on attractive investments, there is room for a development bank, which is in the process of being launched (CDF). Articles of incorporation have been approved and the mandate is to fund the capital projects supportive of government policy. The fund will need to attract private sector funding so the same principles regarding government run companies will be important considerations in the governance and management of the fund – it will need to be transparent and be seen to be independent of government interference.

Full details of government's planned capital expenditures can be found in the Appendices.

Government also has a role as owner of commercial enterprises. It is the sole share-holder of CDM, Curinde, CPA, the Refinery, Curoil, along with the utilities and services of Aqualectra, UTS, C-Post and others. Government thus has both a regulatory role as well as a shareholder role. The need for capital investment in the majority of these businesses makes the business models and governance principles an urgent consideration for government.

Investments will no doubt require Public-Private-Partnerships (PPP). The SOEs, though unique businesses, face a range of common challenges including an aging workforce, aging infrastructure, the need for new technology and capital, the need for more skilled and capable young staff, and an investment climate which encourages FDI. This latter issue would benefit from greater political stability and responsive public service, an issue covered in a later chapter.



However an investment taskforce charged with investigating optimal arrangements for investments in government run companies and models of PPP should be an early priority, along with:

- Require all SOE company financials and annual reports to be publicly available.
- Engage with sector experts on international models
- Carry out an in-depth financial analysis, on export revenue, import costs, and current barriers for profitability (including strength of management team, governance models, business models and opportunities for introducing competitive forces into monopoly services)
- With the positive developments at Dry Docks, partner with them and pave the way for a strategic partner
- Engage with unions on an ongoing basis as to the purpose and effects of the modernization efforts.

Government, as owner of utilities, has a responsibility in terms of policy and regulation as well as capital investment. The plans of Aqueductra are covered in detail in the following chapter. C-Post, the national postal service, and UTS, the telecommunications agency, are both facing disruptive developments in their industries arising from trends in e-commerce and the internet. C-Post has experienced a dramatic decline in mail volumes (a phenomenon shared by postal services worldwide) as citizens adopt email and internet communication. Expenses now outstrip revenue. A turn-around strategy launched in 2009 has successfully introduced services linked to online shopping (Puntomio, China2you and soon to be launched Europe2you), and costs have been reduced through community mailboxes (replacing home delivery), along with other measures. Future strategy is based on further developing as a regional freight hub, Freezone enabler and aggregator to the region.

UTS has transformed, along with other national telecommunications companies, from landline to data-driven and mobile services, with a regional presence in a number of business areas.

However new competition along with consumer use patterns has reduced revenue and margins, the former down approximately 20% since 2010. A 2011 turn-around strategy has been rolled out in the last three years, focusing on fibre to business, high speed to all households, a mobile LTE network, internal systems improvements and reducing workforce. But the trends signal a need to adjust to lower revenue and higher technology, requiring capital investment at a time when revenue is being squeezed. Options, including finding a strategic partners, are being weighed.

Finally, government has a role beyond economic growth, to ensure that growth is inclusive and equitable: i.e. that Curaçaoans able to work and benefit directly from economic growth are given every opportunity, and those who cannot receive benefits and protection from the increase in wealth.

The following table outlines how each Ministry's priorities will support economic growth and ensure that it is inclusive:

Table 10

Ministry	Priorities supportive of Inclusive Economic Growth
AZ	<ul style="list-style-type: none"> • Economic diplomacy (collaboration with MEO: countries and organizations) • Future of the Refinery (Multi-Disciplinary Project Team/MDPT) • Task Force /Program Bureau for economic investments
BPD	<ul style="list-style-type: none"> • Nota Future of (Public) Service • Permits' Office • Kranshi etc. • Central Complaints Desk • System for Basic Registration (Stelsel van Basisregister) • Centralization tasks SSO (Personnel and Administration)
Finance	<ul style="list-style-type: none"> • Long Term Economic Strategy • Master plan • Effectively manage chronic conditions within the community • Tax Compliance • Capacity Development • Project System for Basic Registration and Central Planning Agency/Bureau • Effective, efficient, accessible and affordable government: improve financial management • Guarantee effective supply and demand related to the real/factual need of the labor market.
Health	<ul style="list-style-type: none"> • HNO: New Hospital Otrobanda: construction & arrangement hospital organization • General health insurance & governance structure • Rotating Funds (Fondo Rotativo) – increase self-sufficiency (food) • From Farm to Fork (project) • Encouraging local pig breeding/cultivation • Strengthening institutional structure • Open market for care providers • Integrated spec. companies.. social return as a precondition before entering into contracts with third party providers • Development of medical health tourism
Justice	<ul style="list-style-type: none"> • Permits for foreign investors in association with the Ministry of Economic Development/ Ministry of General Affairs. • National strategy to prevent and combatting of crime (economic growth= growth of criminal activities). • Integrated approach (learning and work programs) in association with the Ministry of Social Development, Labor and Welfare, (SOAW), the Ministry of Education, Science, Culture and Sports (OWCS) and the Ministry of Economic Development (MEO). • Clear and transparent window function. The quality of service has to be the core issue. • Protection of Intellectual Properties • Implementing new traffic safety program, focused on reducing traffic fatalities and improved adherence to traffic laws and regulations

Ministry	Priorities supportive of Inclusive Economic Growth
Education (OWCS)	<ul style="list-style-type: none"> • Create connection/relationship between education, economy and the labor market. • Create connection/relationship between education & entrepreneurs (small businesses, be proprietor of your own company). • Our strengths and opportunities as a nation (Curaçao). • Technology, education and science related to innovation. • Excel and fortify, re-capacitate the market, professional development • Curaçao being a part from an international network for excellence. • Creativity as a goal for individual development. • Culture as a foundation/base for small businesses. • Curaçao as a country of immigration and emigration (commercial, education, requirements for jobs, bridge to excel (Carmabi, SEHOS, UOC and other universities and research entities). • Curaçao's center of cultural tourism on the list of UNESCO (World Heritage). • Government, social and professional mobility (the best brains). • Flexibility in the labor market, national and internationally. • More participation of all regarding progress in the economy: learning and work programs, special courses on specific subject, guidance/coaching towards work, continuous re-capacitation.
SOAW	<p>1. Elderly</p> <ul style="list-style-type: none"> • Subsidy policy • Infrastructure & livability • Neighborhood development • Integrated care within the chain <p>Poverty alleviation</p> <ul style="list-style-type: none"> • Activation policies towards subvention /aid for those entitled • Neighborhood development/active citizens participation • Sustainable social development <p>Youth</p> <ul style="list-style-type: none"> • Policy focused towards prevention/care/safety and protection • Policy focused on reducing youth unemployment
VVRP	<p>Traffic and Transportation</p> <ul style="list-style-type: none"> • Traffic safety (congestion) • Security • Mobility (land, sea and air) • Telecommunication (innovative and effective) <p>Infrastructure and spacious planning</p> <ul style="list-style-type: none"> • livable neighborhoods • recreation and green • inner city as core/main town #1 • optimal development of area/land • water management

Broadening Ownership of the Economy

Four measures will help ensure that economic growth is not limited to a few business associations and financial analysts, but instead is widely understood and influenced by all citizens.

The first is holding neighbourhood dialogues on the National Development plan and its themes, engaging them in the range of choices, options and trade-offs and the impact the economy has on education, environment, governance and what it means to be a citizen of Curaçao.

The second is in raising awareness and opportunities for new skills in entrepreneurship, innovation and the importance of exports in an island nation.

The first two will help with a third, more important plank, which is creating a citizenry asking, and voting, for coherent economic policies from their political parties and government. A deeper understanding of economic affairs will raise the quality of political debate and will require all political parties to prepare coherent platforms. This awareness-raising should be carried out with media and with political parties themselves, so that none can run without a published and fully costed platform. If this is to happen, capacity should be introduced in government for an agency to complete objective costing of political platforms, publically accessible.

Finally the monitoring and oversight of the implementation of this, and future NDPs, will involve external stakeholders. See a later chapter for possible models.





Sustainability

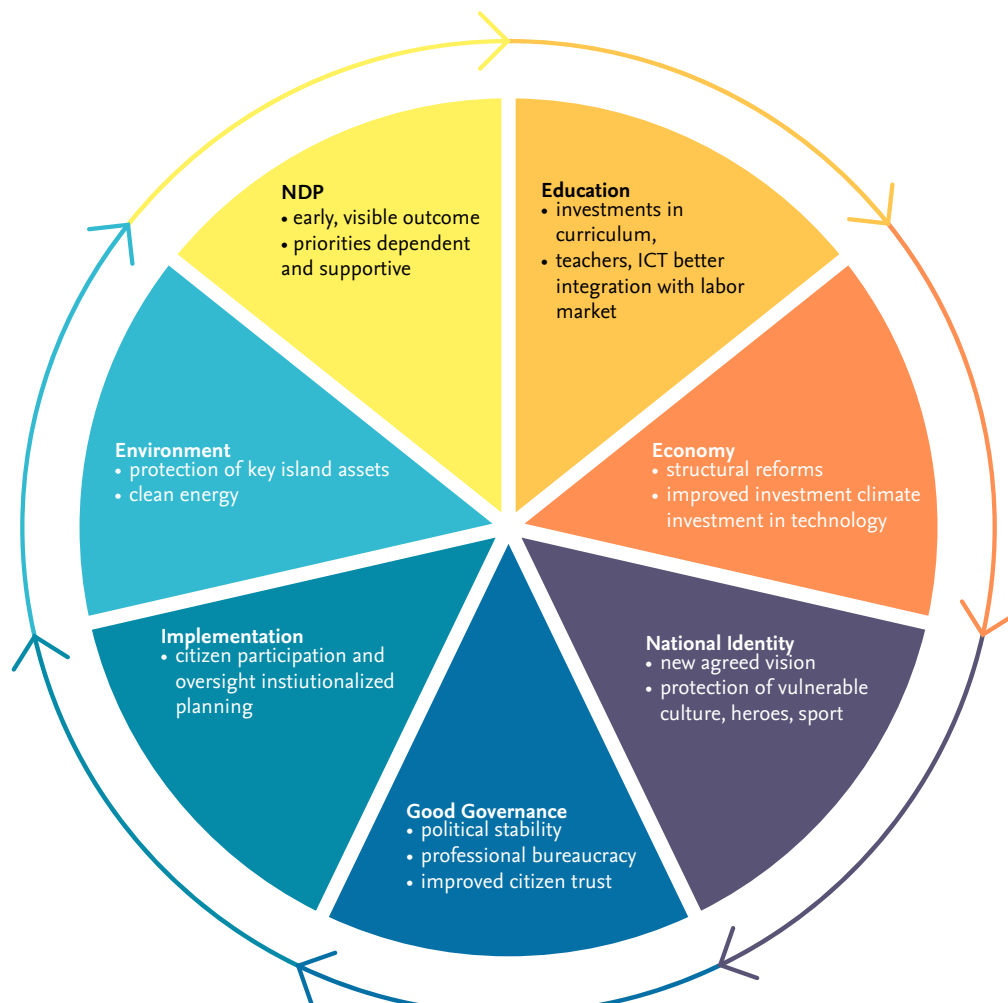
Why is it important?

In figure two in the Introduction section, Sustainability was identified as a cross-cutting theme, standing both on its own and as an integral part of every NDP theme. The United Nations has determined that sustainability is inextricably linked to basic questions of equity — that is, fairness, social justice and greater access to a better quality of life, such that a nation is able to provide for the needs of today without compromising the needs of future generations. Environmental protection and resiliency are important components of sustainability, but are not the only aspects important to the success of the NDP. Sustainability is the investment today and stewardship tomorrow for the future we want.

It's particularly important to Curaçao in two broad areas: the spheres of activity covered by the NDP and the Environment.

The vast majority of interviews conducted for the NDP shared a common theme: implementation is our main challenge. A symptom of this lack of execution was the plethora of “one-off” plans and reports, outlining a range of priorities (and the main priorities did not change from report to report) but little follow-up execution. The initiatives outlined in each section of the NDP are rooted in areas which will lead to ongoing and sustained change. The priorities are broad enough that the details and direction can be altered should circumstances change (resiliency) while the reforms are rooted in structural change which will allow for transformation.

Figure 21




Each of the themed areas has a focus for change, but every improvement that is made has positive impacts on all other areas. Investment in clean energy benefits the environment and the health of Curaçaoans, and may further reduce the cost of energy in future for businesses and makes exports more competitive. Improvements in Education are beneficial for the economy but also helps create happy and well-rounded citizens. Good governance will help execute the policies of incoming governments but also supports long-term sustainability in all spheres of life.

This chapter is focused on the Environment and particularly efforts to be made for two relevant SDGs.

What will be done

Table 11 Sustainable Environment SDGs, Targets and Priorities

Goal 7: Ensure access to affordable, reliable, sustainable and modern energy for all	
Targets	Priority Projects
7.2 increase substantially the share of renewable energy in the global energy mix by 2030	Further investment in Tera Cora wind-farms, providing additional 16 MW energy.
7.a by 2030 enhance international cooperation to facilitate access to clean energy research and technologies, including renewable energy, energy efficiency, and advanced and cleaner fossil fuel technologies, and promote investment in energy infrastructure and clean energy technologies	Roll out Smart Meters over next three years, to reduce costs and provide better management of provision and usage and energy costs.
7.b by 2030 expand infrastructure and upgrade technology for supplying modern and sustainable energy services for all in developing countries, particularly LDCs and SIDS	Goal of 40% total energy from renewable sources by 2020
	EU funding of 16.7 M Euros for investments in renewable energy
	Switch to LNG to fuel for refinery and utilities
Goal 14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development	
Targets	Priority Projects
14.1 by 2025, prevent and significantly reduce marine pollution of all kinds, particularly from land-based activities, including marine debris and nutrient pollution	Blue Halo Initiative to monitor the state of marine resources
14.2 by 2020, sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration, to achieve healthy and productive oceans	Government to respond to findings
14.3 minimize and address the impacts of ocean acidification, including through enhanced scientific cooperation at all levels	Ratify and implement Fishing Policy (including no-fishing zones)
14.5 by 2020, conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on best available scientific information	Implement sustainable tourism strategy from ratified Master Plan
14.7 by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism	Continue to sponsor scientific research through Carmabi and other agencies
14.a increase scientific knowledge, develop research capacities and transfer marine technology taking into account the Intergovernmental Oceanographic Commission Criteria and Guidelines on the Transfer of Marine Technology, in order to improve ocean health and to enhance the contribution of marine biodiversity to the development of developing countries, in particular SIDS and LDCs	Integrated water resources resources Management Taskforce and Action Plan (incl. Integrated Coastal Zone Management approaches)

The following areas were identified for priority action in the paper, National Report of Curaçao, prepared for the Third International Conference on Small Island Developing States, held in Samoa, 2014.

These priority areas align well the SDGs:

- Energy and renewable energy
- Water management
- Waste management
- Marine research and protection of ocean

Aqualectra is key for the first two initiatives. Recent studies estimate that over 23% of the water is either wasted (down from a prior 25%), or unaccounted for (likely due to old and leaking infrastructure) while electricity is losing less than that (10-15%), also down to infrastructure inefficiency or theft. Aqualectra has a goal of reducing water loss to 17% by 2018 and electricity loss to 10% through investment and proactive management.



Energy and Renewable Energy

The cost for electricity used to be the highest in the Caribbean, though recent measures have improved Curaçao's position. However if the economy is to be stimulated, through traditional export businesses as well as new SME's, the cost of doing business should be reduced. Aqualectra and other private providers have been investing in renewable energy projects, including solar panels and wind turbines, since the 1990's, and have supported other renewable energy projects, such as the solar instalment by Carmabi. Aqualectra reports that wind energy now contributes 18% of current demand, while renewable energy contributes 22% of the total. By 2017 it will increase to 30% and by 2020 it will form 40%.

Aqualectra has already invested 74M ANG in two windfarms, 15 MW each, at Tera Cora and Playa Canoa through a power purchase agreement and plans to expand Tera Cora to provide a further 5 wind turbines of 3.3 MW each, through a power purchase agreement with Nu Curaçao B.V.

These will be operational in mid 2016 and will require a 36 M USD investment. One additional permit, which is pending, is currently needed from the government to commence with this project.

In addition to investments in renewable energy Aquallectra plans to install Smart Meters (both for electricity and water) for approximately 78,000 customers for both utility services. The roll out of the installation of meters and monitoring systems will take approximately 3-5 years and will allow proper monitoring for usage, and prosumer provision of power back into the grid. This will save costs in manual checks of meters and introduce greater efficiency into energy provision and use. The meters will cost 30 M USD, communication software and system a further 2 M USD, and a meter replacement program an additional 7.5 M ANG.

The EU Development Fund has selected Curaçao as a potential recipient of 16.7 M Euros for renewable energy projects, and has interest to provide this funding towards projects such as deep sea-water cooling. However an initial assessment found that Curaçao is not yet eligible to receive these funds (which would be managed through the government budget). The EU delegation found that, though Curaçao's macro economic environment had been improved through recent initiatives, public policy, public financial management and transparency were not yet in place, so that additional improvements are needed before the funds could be released. Aquallectra and other stakeholders have identified the support and reform needed from government if they are to meet their business and environmental objectives. These are outlined at the end of this chapter but includes education, policy and regulatory reform. The economic chapter has already outlined the plans by the refinery to meet new environmental standards through transitioning to LNG as the operating fuel. However it is worth highlighting the reductions to greenhouse gases and other noxious emissions expected within two years as a result of this \$500 M USD project: NOx 92% lower; COx 22% lower; SOx 99% lower; Particulates 98% lower; Heavy metals 99% lower; Greenhouse gas 20% lower.

Ocean Management

While Curaçao has one of the healthiest coral reef systems in the Caribbean, it has lost approximately 20% of its coral over the last 25 years, through pollution, storms and over-fishing. In addition to being important to the Caribbean region, healthy reefs are vital for Curaçao as they provide the basis for the island's tourism and fishing industries, lower public health risks and prevent storm damage of nearshore infrastructure. Curaçao has 68 species of coral, i.e, 70% of the total number of Caribbean species.

Research into marine biology is conducted by the Carmabi (Caribbean Research and Management of Biodiversity) Foundation who started collaborating formally with Substation Curaçao. Carmabi is supported by various government branches, e.g., by MEO with its mandate to design fishing policies.

The Foundation is responsible for managing nine protected areas, providing education to schoolchildren on environmental issues, and is a significant ecological research facility in the Caribbean, hosting many scientists and projects each year. Protected areas on Curaçao include:

Table 12

Areas with formal protection	Area covered
Northwest Curaçao* (Ramsar; since 2013)	24.4 km ²
Muizenberg (Ramsar; since 2013)	0.65 km ²
Rif St. Marie (Ramsar; since 2013)	6.7 km ²
Malpais/Sint Michiel (Ramsar; since 2013)	11 km ²
Nature Parks without formal legal protection	Nature Parks without formal legal protection
Curaçao Marine Park (since 1983)	10.4km ²
Christoffel Park (since 1978)	23 km ²
Shete Boka (since 1994)	4.7km ²

A key priority is the ratification and implementation of sustainable fishery policy, which would set aside 30% of the coast as no fishing zones. This policy has been developed with the input and cooperation of local fishers, who have noticed the decline of fishing grounds and species. MEO has a unit with responsibility for the development and finalization (through to ratification and implementation) of the fishery policy. Regional and international efforts to reduce the impact of climate change are also vital for the reefs of Curaçao – as an example, in 2010, the worst coral bleaching impact was felt in the Southern Caribbean when ocean temperatures warmed abnormally. The protection of mangroves is also a priority as they protect the shore against storms and contribute to healthy coral and fish communities.

A recent study (OCTS Environmental Profiles of the Caribbean, 2015) listed four severe threats to Curaçao's environment, which all have some impact on ocean management and health.

- Climate change (coastal land; mangroves; coral reef threats from rise in temperature and acidification)
- Pressures on habitats and biodiversity (coral reefs, mangroves, fish, birds are all threatened by uncontrolled developments, pollution, chemicals, sewage)
- Invasive species
- Water and air pollution

The Ministry of Public Health, Environment and Nature has the regulatory and statutory authority for environmental protection on Curaçao. Policies and regulations are in place, but many are in need of updating and enforcement. Other institutions and agencies are also involved in ocean management and protection, including the Environmental Advisory Board, CPA (the Harbor Authority), MEO and the Tourism Board, VVRP (operates the sewage facility) and Carmabi.

In February, 2015, the Government of Curaçao signed an MOU with the Waitt Institute, to investigate the state of Curaçao's marine resources. The initiative, called "Blue Halo Initiative, Curaçao" involves data collection on water quality, the state of fish, coral and other species to provide insight on what further ocean management policies might be needed. Visiting scientists along with scientists from Carmabi will be working on this scientific assessment, to be provided to the Government in early 2016.

Integrated Water Resources Management

High on the agenda for the Government of Curaçao for 2015/16 is the issue of integrated water resources management. Curaçao has few natural reservoirs of fresh water and relies on a series of dams built by the Netherlands decades ago, and a desalination (reverse osmosis) plant, operated by Aqualectra. Several Caribbean islands have introduced an integrated water resources management framework into their nations, to promote environmentally sustainable use of scarce water resources. Tools include rain water harvesting, secondary water use, integration with tourism operators (including hotels, resorts and apartments), farmers, public awareness, and water demand side management with supporting laws and regulations at the national level. VVRP is developing an action plan with the assistance of regional experts and will be introducing measures in 2016. The UNDP is looking to support this initiative through its ongoing Kòrsou Kapasité program. An early step seeks to sign an MOU between VVRP, GMN, Ministry of Finance, TAS Foundation and the University of Curaçao to pursue an integrated water resources management action plan. This will be carried out with the support of Global Water Partnership.

Minimizing water loss through modernization and technology is an objective of Aqualectra. Investment in Smart Meters (78,200 meters for water) to be rolled out over the next 3-5 years will allow for precise measurement of usage, plus reduce the need for manual checks. The company is also continuing with pipeline reconstruction, to reduce the losses incurred due to aging infrastructure. This requires 24.8 M ANG to fund 3 years work and 5 years repayment.

Waste-Management

Selikor is the government owned company responsible for waste management on the island. At a recent SIDS conference in Samoa waste management was identified as an urgent requirement, as the current landfill has only 10 years worth of capacity remaining. Selikor and Aqualectra have investigated a waste-to-energy facility for the long-term.

However the costs of a large facility are beyond the means of Selikor (which has a mandate of breaking even in costs) at the moment. Instead the short term priorities include an incinerator for hazardous waste processing, expanding landfill capacity, upgrading recycling processing and introducing an additional waste drop off centre in the east end.

Another priority is to review and update existing legislation and the waste management plan, along with allocating ongoing funding towards public education, including school campaigns to ensure citizens are aware of the environmental risks and need to protect and preserve. Funds for these short-term measures are estimated at \$250 M ANG (long-term costs, which include the construction of a new waste management & processing plant).

Government is not the only entity involved in sustainability, and arguably not even the most active player. A range of NGOs, private sector entities and volunteer groups are committed to the protection of the environment and specific activities. Community recycling is largely carried out by Green Force, a recycling and environmental company, while Selikor works in partnerships with a range of businesses for glass, oil, paper and construction material recycling. One area where the private sector and NGOs are leading government is in the field of eco-sustainable housing. This is an approach which government should support and introduce into its future urban planning and revised building codes.

Curaçao, through a range of entities, has begun the investment into environmental protection and sustainability. But the long-term risks are real and much more will need to be done. Air pollution linked to the aging refinery continues to be an issue, and has prompted legal action by some citizens and NGOs.

In discussions with utilities and other players, they outlined strategic issues which government deal with, many of which are common to each. These include:

- Policy and regulatory reform, enforcement and implementation. This is true both for operational policy (i.e. how to best protect limited resources; how to balance tourism/development versus the environment, etc.) and for business policy. Aqualetra has recently completed a cost of service study and must now engage government and the regulator about rates, O&M cost recovery and the need for CAPEX. Should rates cover infrastructure and capital costs, or should this be an investment made by government?
- Education – most utilities (and many private sector businesses) are spending significant amounts of money on training new recruits, to provide the necessary skills. While many businesses must supplement and provide specific skills as an expected cost, feedback from many indicate they are investing in learning that is normally the business for the education system. There may be scope for government and these agencies to combine forces on vocational training which would reduce their overall costs. Most are also facing a demographic challenge with an aging workforce which requires replacing, and training.
- Investment – linked to the policy reforms above, many utilities urgently need funding for a CAPEX program, to rehabilitate aging infrastructure and to invest in new technology. The funds will need to come either from user fees or from government, or perhaps a combination of both.

Stakeholders would like to see more in the following areas:

Legislation with respect to sustainability

- Sustainable building codes
- Smart city development(s)
- Carbon footprint reduction (less fuel burden)
- Recycling initiatives
- Waste water management.

Along with this, greater cooperation and respect between government and non-government entities would lead to better outcomes.

Table 13

Ministry	Priorities supportive of Sustainable Environment
AZ	<ul style="list-style-type: none"> • Options for Refinery Future
Health, Environment and Nature	<ul style="list-style-type: none"> • Reducing environmental pollution • Quality improvement of public green • Nuisance permits • Monitoring compliance of environmental laws in association the Ministry of Traffic, Transportation and Spacious Planning • New irrigation methods (in partnership with VVRP)
Finance	<ul style="list-style-type: none"> • Integral and interactive budget preparation • Identify new fiscal incentives • budgetary framework linked to real/feasible policy priorities through all ministries
Economic Affairs	<ul style="list-style-type: none"> • Sustainable Tourism • New Fisheries policy
VVRP	<ul style="list-style-type: none"> • Integrated water resources management • Liveable neighbourhoods • Recreation and green



National Identity

Why is this important?

“Together we can surely make a difference”³⁹

Contained in the quote above is the reason why national identity is important. National development is dependent on the majority of citizens rallying behind a vision of the future (development) that will benefit all, including future generations and the vulnerable (sustainable development). National Identity is important, therefore, because a people going forward together in common cause is the most important success factor for the National Development Plan.

National Identity can be an elusive concept but a powerful binding force when it can be defined and described and held in common by its people. At its simplest it is defined as what knits us together – how we have a sense of belonging to one another, a place, a shared history and a desired future.

For the purposes of this plan four elements of National Identity are used to organise a strategy for strengthening within the NDP:

1. National Vision: have we described and subscribed to a shared vision of our future?
2. Shared Values: have we articulated and adopted a set of values which describe expectations of ourselves and each other?
3. External Brand: how are we known to the outside world? What is our reputation?
4. Values in Governing: what are our mutual rights and duties to one another, by virtue of our shared membership, as expressed in our governing rules? What access, opportunities, protection and investment does the governing system offer to us?

The current situation, in each of these elements, in terms of strengths and weaknesses are briefly examined:

National Vision

The NDP began with Vision 2025, a vision statement produced by an extensive and broadly consultative process a few years ago. Many stakeholders pointed to this vision statement in the drafting of the NDP as an aspirational vision still unfolding.

³⁹ Pg 7 Building a Life, Building a Nation; Facts and Faces of Regional Migration and Integration in Curaçao ; Ministry of Social Development, Labor and Welfare; 2014

However many others wished to see a new visioning exercise, one that would be more concrete and up-to-date. The vision offers four areas for development (high quality of life; high standard of living; improved social cohesion; and increased adherence to democratic governance principles) which are reflected in the objectives of this NDP. Some criticized the vision for being too broad and applicable to most nations.

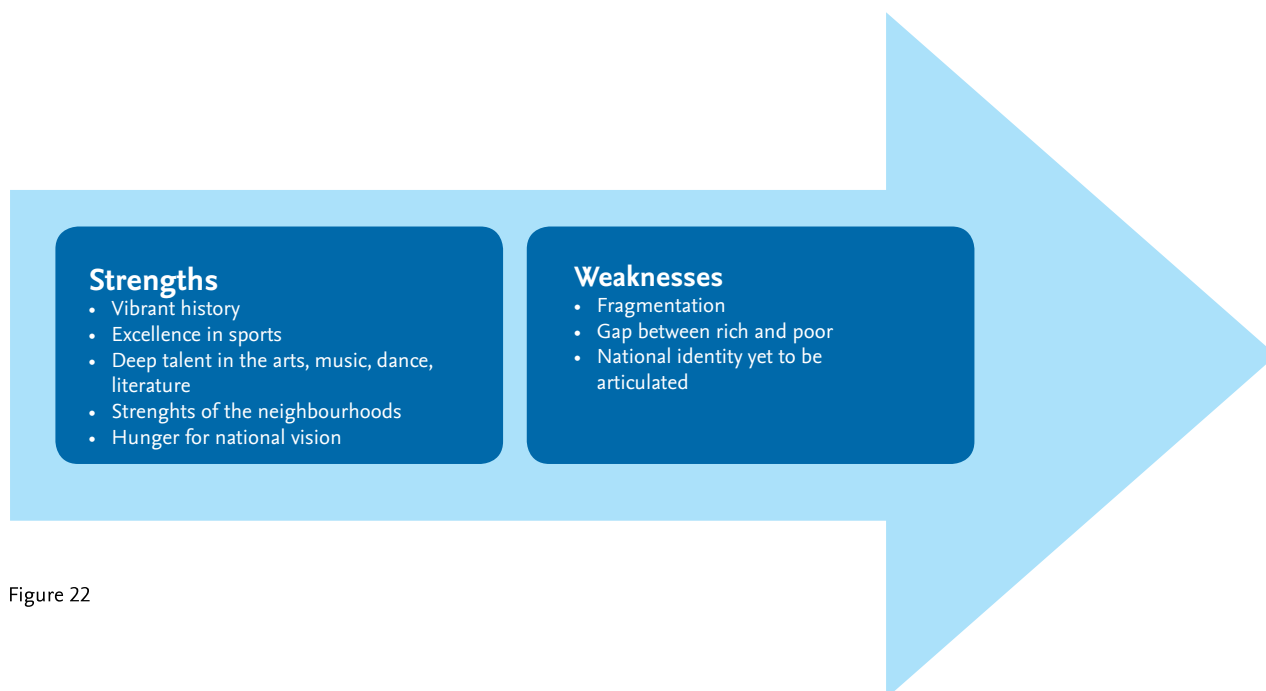


Figure 22

Perhaps of most significance in this debate might be the question as to whether the majority of citizens identify with this vision, or whether it is time to invest in a new visioning exercise, or, even more ambitiously, in a defining national identity exercise?

Shared Values

Curaçao has been shaped by its history and a national identity is made stronger through a shared culture, shared goals and a shared national narrative. The island has a long and rich history, traditions in music and culture that reflect its narrative, excellence in sports, and prior strategic plans have outlined shared values, including Responsibility, Integrity, Faith in God, Positive Attitudes, Productivity, Family Values, Leadership, Perseverance.⁴⁰

The values describe how we treat one another – the behaviours which we display within our families, our neighbourhoods, workplaces, schools and beyond. Celebrating national heroes, and stories, creativity in dance and music – all reflect a celebration of the past and point the nation towards a hopeful future.

⁴⁰ Vishon Kòrsou, 1999

No formal survey exists on the current state of shared Curaçao values, so analysis is limited to interviews and “straws in the wind” (such as crime rates, traffic fatalities, domestic violence, and others) which indicate an erosion in the exercise of these traditional values.

External Brand

Each nation interfaces with the external world in a myriad of relationships, building a reputation or a brand. The 2015 Tourism Master Plan speaks of the high reputation of Curaçao that foreign tourists have (as evidenced in several surveys), and business metrics from five or more years ago speak to the pivotal place Curaçao held in a number of areas – ship repair, offshore financing, amongst others – the reputation of the island as a major economic player was well-established. Its place in the Kingdom of the Netherlands provides confidence, attractive trade deals and access, and a solid regulatory framework. Wildly successful events such as the North Sea Jazz Festival, and Carnival, establish the cultural reputation for the island, and individual sporting successes in tennis and baseball also add to the positive brand.



However Curaçao can't rest on past success, or allow its external reputation to go unmanaged. An export nation depends on its external reputation and brand.

Values in Governing

Closely linked to Shared Values is the issue of how a nation is governed. Areas such as the opportunities available to its people, access to government services, protection of the disadvantaged, the amount of inequality in society – these are factors in the rules that govern what we can do, and be.

Good Governance and Public Service are topics covered in a subsequent chapter, and initiatives to address improvements are covered explicitly there.

Covered in the analysis of governing values are some of the outcomes of policy decisions and how they impact on the lives of citizens: inequality; access and quality of public services; public safety; social cohesion; justice; housing; land use; protection of the vulnerable and humans rights.

More recently, however, Curaçao has faced some challenges, including: fragmentation, a widening gap between the rich and the vulnerable, and uncertainty over the long-term direction for the nation.

Analysis below on fragmentation and inequality are only two examples of some of the pressures being experienced for some citizens, especially the disadvantaged.

Fragmentation

The Transparency International report, amongst others (the UNDP Scoping report for the NDP included), have cited fragmentation as an issue, writing: “Curaçao is a society struggling with cohesion; the fragmentation and polarisation of the society goes along social, economic, ethnic and even colour lines”⁴¹

Curaçao is a land of immigration, where four in ten are either first or second generation immigrants⁴², adding to the rich cultural diversity, but perhaps complicating the development of common visions. In addition to immigration, Curaçao is shaped by emigration – 100,000 citizens live in the Netherlands, almost as many as those living on the island (150,000).⁴³ Since Curaçao is part of the Kingdom, the Netherlands has always been the dominant home for the diaspora. The constitutional changes of 2010 were a powerful marker for Curaçao, leading to a lessening of ties to the other islands of the former Netherlands Antilles, and formed the starting point for Curaçao as an autonomous country within the Dutch Kingdom.

It was an emotional debate and vote, which sometimes divided families and communities. Within the umbrella of national identity lies the critical factor of social cohesion. Many reports, including Transparency International, cite a weakness in Curaçaoan social cohesion, important to the NDP because trust and cooperation must be features for implementation.

Inequality

Economic development in Curaçao will ensure that the vulnerable are not left behind. The increase in national prosperity will generate new tax revenue, which can be invested in a number of areas, including protection of the vulnerable.

The average Gini co-efficient⁴⁴ is .385, lower than levels of 1992 (.412) but masking deterioration in position of the middle income groups. Curaçao finds itself competitive (second lowest, or second best) compared with the most recent Gini measurements in the region.⁴⁵

⁴¹ pg 22; National Integrity System Assessment; Transparency International, 2013.

⁴² pg 5; Building a Life, Building a Nation, SOAW; 2014

⁴³ pg 17 Transnational Education Policy; MEO; 2015

⁴⁴ pg 17, ibid

⁴⁵ World Bank Gini index database

Table 14

Country	Gini Co-efficient (higher indicates greater inequality)
Curaçao	38.5
Dominican Republic	45.7
El Salvador	41.8
Haiti	59.2
Honduras	57.4
Jamaica	45.5
Mexico	48.1
Panama	51.9
St Lucia	42.6
Trinidad	40.3
OECD median (before tax and transfer)	46.1
USA	41.1

However, Latin America and the Caribbean is one of the world's highest income inequality regions, with an overall average rating of 0.51, far higher than the most egalitarian countries which range between .25 and .35.⁴⁶

Those living below the poverty line has improved since 1992 but levels can be improved, as reported by the Central Bureau of Statistics⁴⁷:

Table 15 Poverty Indices Curaçao

	Headcount Index	Poverty Gap Index	FGT2 Index
2011	25,1	8,9	4,2
2001	33,7	14,8	8,3
1992	36,8	16,0	9,2

Lower indicates less poverty for all indices

The report includes the observation that single households have the highest incidence of falling below the poverty line, particularly those who are widowed and/or have primary school or less qualifications. Lying behind these statistics is the reality of the need for greater elder care in Curaçao, a protection and support that must be funded by a more robust economic performance. However it should be noted that, with 25.1% living below the poverty line, Curaçao is outperforming the region, whose average is 35.4 %.⁴⁸

When economic performance improves there is always a risk that prosperity benefits too few. Policies are in place, and will continue to be developed, to ensure that the at-risk are provided protection.

⁴⁶ pg 32 The State of Education in Latin America and the Caribbean; UNESCO Regional Office, 2013

⁴⁷ pg 8 Income Distribution and Poverty in Curacao; Census 2011; report June 2014

⁴⁸ pg 33 The State of Education in Latin America and the Caribbean; UNESCO Regional Office, 2013

Other Areas for Concern

The building of a new hospital offers not only economic stimulus but will be a focal point for improved health outcomes for the nation. Curaçao is an aging population, and the rates of HIV and obesity are two indicators for improvement.

Crime rates have increased and citizens report feeling more unsafe – this is of particular concern to the elderly. Traffic fatalities are too high, public transportation not sufficiently convenient, unacceptable housing conditions in some neighbourhoods. These are flags of concern, of a nation whose policies and services have not been optimally aligned to the needs of its people. And these shape national identity, our sense of belonging and equal opportunity.

The creation of this National Development Plan involved extensive consultations and meetings (see Appendix for details) and a two-day retreat involving over 100 stakeholders. A persistent theme was a hunger for a vision and direction for the development of the nation.

Amongst the more persistent findings from these sessions includes:

- A desire not only for a persuasive vision but even more so for execution and implementation – making decisions and getting on with positive change was a widely-held view;
- An insistence that Curaçao was not like other islands. Linked to this was a pride in the diversity of the economy and, though Tourism is important, support for continued dependence on a range of export businesses;
- Celebration that, in spite of the diversity of many people and cultures, Curaçao is knit together as one, especially during Carnival and other cultural holidays

The UN has developed the Human Development Index as a counter-point to economic measures, such as GDP, while more recently the Social Progress Index⁴⁹ (SPI) has been designed to exclude economic indicators in favour of social and environmental development indicators. The field of development is increasingly recognizing people at the heart of progress, rather than the economy. A strengthened national identity is important to the future development of Curaçao. Research indicates that strong national identity and, particularly, strong social cohesion correlates with stronger democratic practices, better health and education outcomes, and increased household and national wealth.⁵⁰

⁴⁹ <http://www.socialprogressimperative.org/data/spi>

⁵⁰ OECD International Conference on Social Cohesion and Development; The Economic Rationale for Social Cohesion; Robert Foa, Harvard University

What Will be Done

Arguably this is the most important theme to be addressed. Without greater cooperation, trust and pulling together in a common direction, progress will only be made at the margins. This requires that we learn to engage with each other and work together in a different way and build new mental images of our community, thus fostering different attitudes. It will require a combination of actions in various sectors of the community, including the political landscape. A shift in the area of national identity will be greatly supported by progress in other theme areas.

First and foremost, execution of the National Development Plan will provide a basis for unity and a sense of national momentum towards the future.

But in addition to this, specific initiatives and policies will help strengthen national identity and, along with it, greater social cohesion. The title of the most recent UNDP publication of the Human Development Index was Building Resiliency and Reducing Vulnerabilities, pointing to the importance of the policies and services in place to allow for thriving development. The table at the end of this chapter highlights many public-facing initiatives, in terms of better health outcomes, transportation, justice and others, which have little to do with patriotism or national symbols, but everything to do with the mutual rights and obligations that citizens have as a member of society. Improvements in these services underpin a sense of belonging and care.



Figure 23

A few cross-cutting initiatives are highlighted, with a table provided highlighting a range of projects by Ministries to improve health, justice, transportation and a range of public services important to the citizens of Curaçao.

National Youth Development Plan

The ongoing National Youth Development initiative provides an approach which is aimed at better outcomes for the youth of Curaçao, particularly those at-risk. Though relevant across three themes (National Identity, Education, Economy), it is presented here because of its potential to improve the sense of isolation of the youth. The project has proposed the development of a Positive Youth Policy, cross-cutting through 5 thematic and sectoral areas, as evaluated against several internationally recognized sets of indicators. What is specifically important is that it is supported by a process of capacity development through the facilitation of action learning sessions, which contribute to changing attitudes and building trust, thus promoting cooperation.

It's proposed that government issue proposals based on the agreed Youth Policy, invite foundations to apply for funding to achieve prescribed outcomes, and be held accountable against the indicators for effectiveness and efficiency. In taking this approach it's anticipated that only those Foundations with critical mass and demonstrated results will be in a position to win funding. Government will be able to establish more control over policy and results, even while freeing up agencies to be creative in their policy execution.

Neighbourhood Revitalization

Curaçao's neighbourhoods are a vital component of island life. Neighbourhood associations, dialogues, community centres and foundations are all dedicated to the affairs of their local constituents. Sixty-five neighbourhood profiles, based on census data, have been created to monitor poverty and its impacts, under the leadership of the Ministry of Social and Labor Affairs (SOAW).

Volunteer groups, inspired by turn-around stories from Medellin and elsewhere, have worked with local neighbourhoods to bring about small and large improvements, in services, infrastructure and safety (for instance Nieuw Nederlands and the development of the beach at Marie Pompoen, with the help of government).

The Ministry of Traffic, Transportation and Urban Planning has a more national mandate for local development and infrastructure. Architecture, public places, transportation and housing foster community in powerful ways. Though the Ministry of Traffic, Transportation and Urban Planning is actively engaged in implementing policies focused on all these areas, there are inspiring examples of how cities turned around through urban planning, including Medellin and Greenville, South Carolina.

Excellence in Sports and Culture

In December 2014 the Fundashon Desaroyo Deportivo Korsou (FDDK) was instituted, with the mandate for supporting community youth sporting teams and events, and the development of excellence in sports.

The Government of Curaçao also has an official policy on culture (Rumbo pa Independensia Mental), aimed at investment and promotion of the national narrative through arts and crafts.

Protection of the Vulnerable

Curaçao has an effective safety net for the vulnerable within its population but more is needed for the elderly, at-risk youth, teen mothers, and other disadvantaged members. SOAW recently developed a portfolio of 11 priority policies, of which 9 were directed at the protection of the vulnerable.

These included a Neighbourhood Policy (ensuring access to services within the local area); Support Services (to ensure the vulnerable were protected from recent fiscal reforms); Family care, focused on the rights of children; National Action Plan on Gender-Based violence; Development of a Volunteer data bank (to match retirees to opportunities for service); Meals in Schools (for children and the elderly in the local community); Improved psychiatric care for children and teens; and Support to Santa Marta Nobo, a home for the disabled.

Justice Reform

The Ministry of Justice has the third largest national budget, behind Health and Education, with responsibilities for the prison, court system and policing. They are currently investing millions of ANG⁵¹ into the renovation of the Public Prosecutor's Building as well as the prison.

Reform, towards reallocating resources from prosecution and incarceration towards crime prevention, has been in development within the Ministry and as a larger public sector reform initiative, OFO. This is a medium-term development and will be important both to reduce the level of crime (and thus increase the security of the elderly and vulnerable) as well as to improve the outlook and decisions of at-risk youth, redirecting them towards a more productive lifestyle. The Ministry of Justice is not doing this in isolation – it has signed protocols for coordination and cooperation with the Ministries relevant to desired outcomes, including Health, SOAW, MEO, Education and General Affairs.

These initiatives stem from analysis pointing to weaknesses in areas, such as poor housing, poor home life and lack of educational engagement, eventually manifest themselves as individuals requiring police and justice intervention. By entering into cross-ministerial agreements the objective is to make investments early, to avoid costly Justice initiatives later.

⁵¹ see Appendix for Capital Budget figures

Throughout the NDP various Justice policy priorities have been highlighted, supportive of overall NDP goals, with a few having particular importance: reducing traffic fatalities and increasing overall traffic safety; implementing a nation-wide crime prevention strategy; working in conjunction with MEO on investor permits and immigration procedures; and protecting the rights of the vulnerable, including illegal immigrants and human trafficking victims.

National Identity

The Ministry of Social and Labor Affairs recently ran a celebration of national heroes, and the Ministry of Education has incorporated the history of important Curaçao figures into its curriculum. Telling and retelling the national story is and will continue to be vital to the future of the island.

In addition to these initiatives, the NDP Implementation team, in conjunction with the Central Bureau of Statistics and UNDP's Kòrsou Capacita project (Output 2) will develop a SPI (Social Progress Index) baseline and target it for improvement, to measure progress in this important area.

Table 16

National Identity Elements	Objective	Initiatives	Responsible Ministry(ies)
National Vision	Craft a shared national vision for development	Develop a consultative process for articulating a national vision	All Ministries and wide stakeholders
		Structural awareness e.g. (inter) and national holidays and commemorative days	AZ, SOAW, Education
		Citizens' Participation e.g. National Youth Action Programme	AZ, SOAW, Education
		Restructure communication with the public e.g. social media	AZ
Shared Values	Strengthen, or modernize, the shared values of the people of Curaçao	Introduce values into curriculum	All Ministries and wide stakeholders.
	Develop effective and inclusive policies	Monitor indicators for trends in socio-economic database (traffic deaths; crime; surveys; domestic violence)	CSB
	Reduce domestic violence	Preventative measures against domestic violence	SOAW; Justice; Health
External Brand	Improve the reputation of Curaçao to the world	Tourism Master Plan ⁵²	MEO & CHATA
		Trade deals (WTO etc)	MEO
		Progress against Global SDGs, including environmental initiatives	All Ministries
Improved Public Facing Services by Ministry⁵³	Improve the responsiveness of citizen services	Permits' Office Kranshi etc. Central Complaints Desk System for Basic Registration (Stelsel van Basisregister)	BPD

⁵² The Tourism Master Plan is only one of many economic initiatives which will all contribute positively to Curaçao's external reputation. They have been covered in depth in the Economic Chapter.

⁵³ See relevant chapters for initiatives by Education and Economy

National Identity Elements	Objective	Initiatives	Responsible Ministry(ies)
	Access to Better Health and Social Outcomes	<p>HNO: New Hospital</p> <p>Otrobanda: construction & arrangement hospital organization</p> <p>General health insurance & governance structure</p> <p>Strengthening of first line & prevention</p> <p>Open market for care providers</p> <p>Integrated spec. companies.. social return as a precondition before entering into contracts with third party providers</p> <p>Ageing approach</p> <p>Regulation prostitution</p> <p>Elderly care in association with the Ministry of Social Development, Labor and Welfare, (SOAW)</p> <p>Addiction/Rehab Care in association the Ministry of Social Development, Labor and Welfare, (SOAW)</p> <p>Mental Healthcare (GGZ)</p> <p>Policy focused on the adjustment of medical treatment abroad</p> <p>Data collection regarding/ in the context of research policy</p> <p>More attention to geriatric care</p> <p>Competencies of hospital staff must be increased (prevention)</p>	GMN
	Agriculture – improved food security	<p>Rotating Funds (Fondo Rotativo) – increase self-sufficiency (food)</p> <p>From Farm to Fork (project)</p>	

National Identity Elements	Objective	Initiatives	Responsible Ministry(ies)
	Improving social justice and community safety	<p>Combatting & prevention of (youth) criminality and domestic violence</p> <p>Special attention to social aspect: housing plan.</p> <p>Information-driven and safe organization.</p> <p>Family care/ Multi-disciplinary group Duty of care for young people (parental supervision), alimony obligation, guidance/coaching towards work, continuous re-capacity/re-ability.</p> <p>Safety Home</p> <p>Integrated approach to care in association with the Ministry of Social Development, Labor and Welfare, (SOAW).</p> <p>Develop an HRM-Strategy for promoting participation and knowledge transfer (in association with the Ministry of Governance, Planning and Public Service).</p> <p>Implementing new traffic safety program, focused on reducing traffic fatalities and improved adherence to traffic laws and regulations</p>	Justice (with SOAW, Education and BPD)
	Ensure budget and policies align with community needs	<p>Effectively manage chronic conditions within the community</p> <p>Budgetary framework linked to real/feasible policy priorities through all ministries</p> <p>Empathy for the softer/vulnerable side of the community</p>	Finance

National Identity Elements	Objective	Initiatives	Responsible Ministry(ies)
	Safe and liveable communities	Traffic safety (congestion)	Transportation
	• Traffic	Security	
	• Infrastructure and spacious planning	Mobility (land, sea and air)	
		Telecommunication (innovative and effective)	
		Livable neighborhoods	
		Recreation and green	
		Inner city as core/main town #1	
		Optimal development of area/land	
		Water management	





Good Governance & Leadership

Why is it Important?

Governance matters a great deal, particularly when a society has a level of fragmentation. How a nation chooses to exercise power speaks profoundly on the culture and “the way we do things around here”. The political landscape consists of a large and shifting number of political parties and coalition fragility, as evidenced by five separate administrations since 2010. Interviews suggest that many stakeholders blame political instability and lack of continuity for poor implementation of prior plans.

The strengths of Curaçao democratic institutions and legal framework are substantial. The LTES outlined the following (pg. 7):

“...[T]he institutional setting and regulatory environment of Curaçao benefit from the following advantages and strengths:

- Curaçao inherited most of its regulatory system from the Netherlands. Its laws and regulations are equivalent to around 80 – 90 % those of the Dutch Kingdom, including company and business laws. We find that the maintenance of the Dutch legal and judiciary system is a major positive factor for Curaçao. In particular, it provides the legal stability and predictability required by businesses and potential investors.
- Regarding trade and international relations, Curaçao benefits from the most generous tariff regime granted by the European Union, and is subject to a preferential regime of rules of origin and special provisions on transshipment.
- There are reform policies, sectoral plans and incentives that are either already in place or ready to be implemented and that can have substantial and rapid impact provided that they are fully implemented in a broader context of simultaneous reforms.”

Some of these reforms are underway, outlined in the following pages, and can be leveraged for further strengthening of governance in Curaçao.

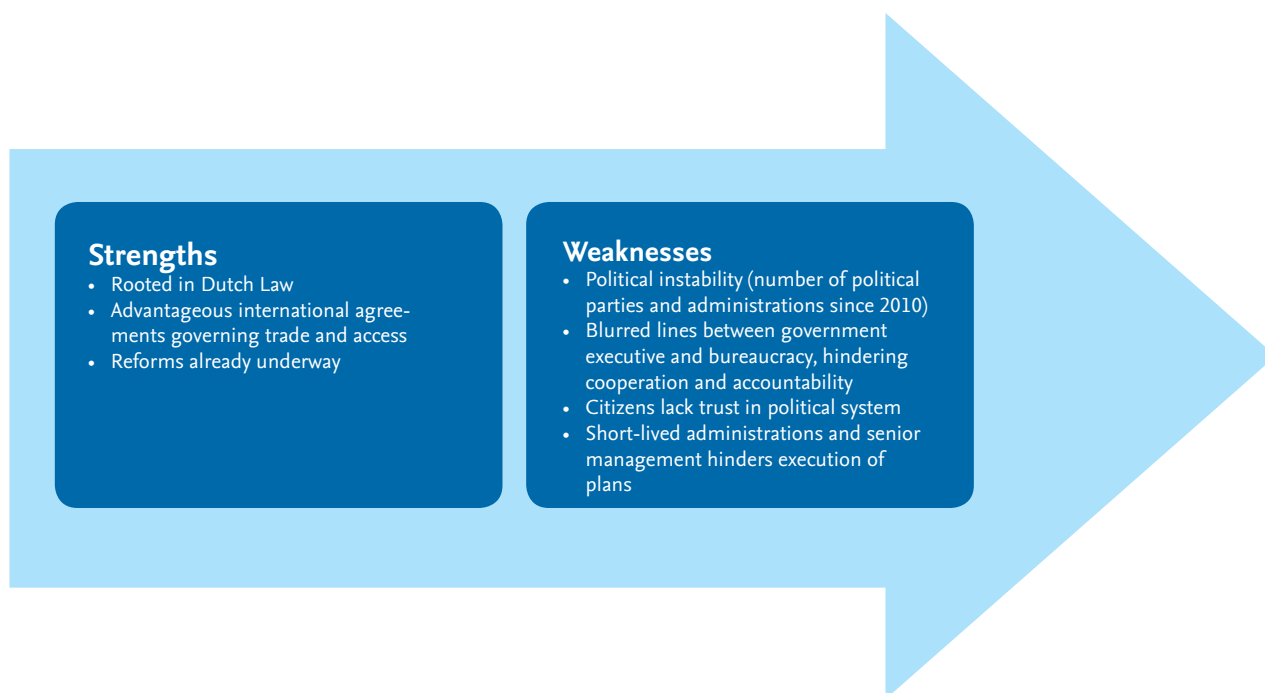


Figure 24

Transparency International published a review in 2013, producing several recommendations in the area of governance reform and improvements.

The following quotes from the 2013 TI report indicates the most critical areas for reform (**bold emphasis** in place for the purpose of the NDP):

In the Curaçao National Integrity System, party discipline governs both acts of members of Parliament as well as those of the Executive, blurring the constitutionally-prescribed division of powers. Parliament in practice does not operate independently, but instead is widely considered to operate as a ‘rubber stamp’. Whereas the independence of members of Parliament is firmly enshrined in the constitution to ensure Parliament represents all the people of Curaçao, the logic of ‘a party political mandate’ is firmly embedded in the Curaçao political landscape in practice. Similarly, political interventions leave little room for manoeuvre for the Executive in its decision making processes. Because of this weakness, the inevitable and necessary nuances temporarily put aside, Curaçao’s parliamentary democracy has not yet sufficiently evolved into a system which adequately represents the electorate. Instead, sometimes, it resembles a system in which today’s winners – backed up by their extended families, business partners, party financiers and voters – try to exploit legislative and executive power temporarily granted to further specific interests. As a result, the rights of the large minority are insufficiently safeguarded.

Party discipline, however, cannot, be sustained at all times, and the Curaçao National Integrity System is also characterised by a political landscape with changing coalitions, in which today’s small majority governing the country may be tomorrow’s large minority in Parliament. In essence, the latter is considered to be a good thing, because it is one of the few existing mechanisms to ensure that the Executive is held to account.

Nevertheless, the accountability of the Executive remains weak in practice. This, in turn, undermines the capacity of the public sector to operate effectively. For example, the Executive exerts strong influence on appointments in the public sector as well as on its output, including some examples of direct interference in administrative matters. Furthermore, the specific circumstances of the new constitutional relations, requiring two executive layers to be merged into one, have not resulted in an enhancement of the public sector's performance to date.⁵⁴

The main weaknesses of Curaçao integrity systems are bound up in one common cause – the inherent nature of party politics in all formal and informal institutions on the island, including the media (also assessed as weak in the report). This is tightly linked back to one of the primary pillars for reform in the NDP, national identity addressed at overcoming social and institutional fragmentation. The critique offered by Transparency International should be placed in context however: these are weaknesses inherent to small nations, including islands, where the separation between voter and politician is very small. Governance of a tight-knit community is by nature both complex and intimate. Good governance matters because it is impacting on the capacity to take and implement decisions, to ensure that professional management capacity is in place and supported to do its job, is seen to be transparent and thus signals confidence to external markets.

Four areas of governance particularly need attention:

1. Political capacity – given the wide range of political parties and the proportional representation electoral system, the following attributes must be strengthened:
 - a. The capacity to develop costed policy platforms;
 - b. The capacity to negotiate and operate coalitions; to work across political divides;
 - c. Strengthened transparency and ethical standards
 - d. Expertise on commercial objectives for SOEs, PPP options, and clarity on the related governance, regulatory and business model decisions
2. Strengthened media scrutiny and reporting: the capacity of media to report on policy platforms and their implications during elections, as well as issues during governing periods
3. Informed public debate during elections, and during administrations.
 - a. Citizens increasingly voting on preferred, national policies
4. Institutional capacity – the political nature of the HR system of the public service complicates the alignment of citizen interests to service delivery, and cross-Ministerial cooperation. The following elements should be strengthened:
 - a. Focus of public service to be citizen responsiveness
 - b. Machinery of government review
 - c. Depoliticizing HR system
 - d. Performance Management Framework
 - e. Strategic and Business Planning

⁵⁴ pg 232-233; National Integrity System Assessment, Transparency International, 2013

What Will be Done

Governance reform is a difficult and lengthy process, requiring much time and focus (and dedicated leadership) for both Executive and the public service. International research⁵⁵ also indicates that economic reform leads governance reform in almost every instance of successful change.

For this reason this NDP outlines reform of the economy as early priorities, particularly those aspects of government owned companies to begin the process of de-politicizing decision-making, employment and managing for results. In the validation process for the NDP a wide group of stakeholders brainstormed the factors that they felt could be changed in the short-term and those that could not. Trust and fear (factors in national identity) and the nature of the political system were listed under “difficult to change” while there was hope that the economy and education could be reformed. Thus the NDP lines up with their analysis on priorities for the short-term.

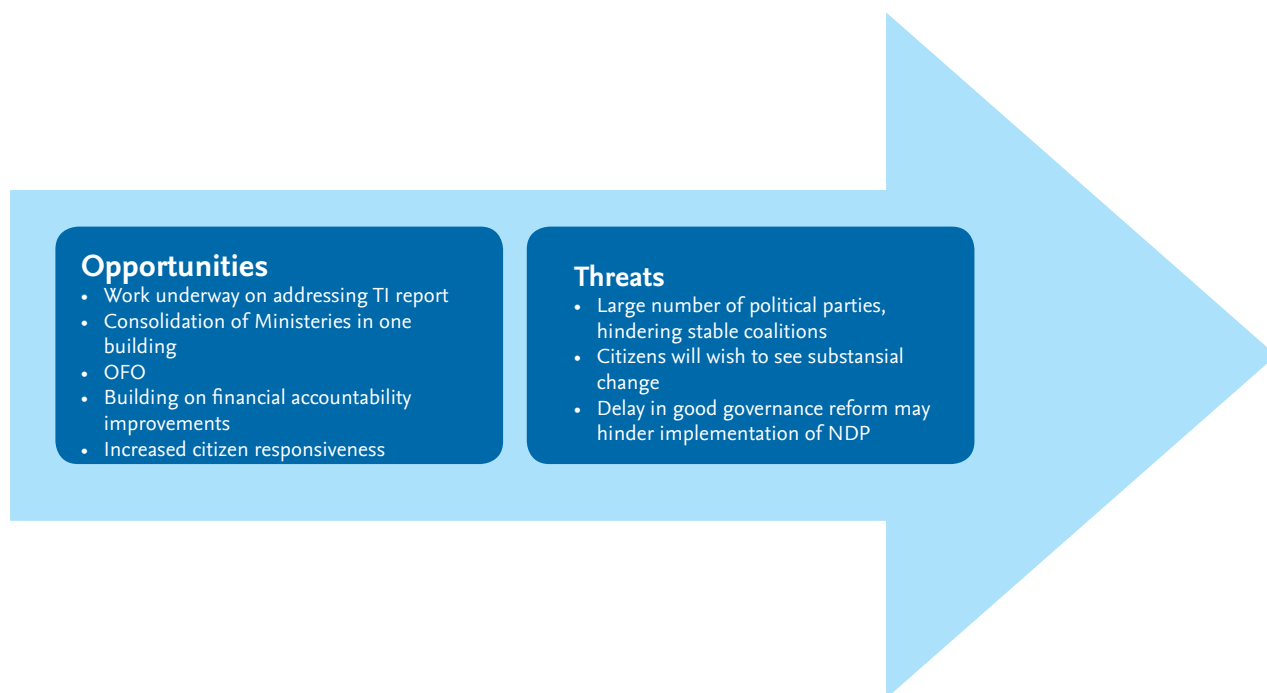


Figure 25

However, though large-scale reform will be difficult there are initiatives, that are both tied to early priorities (economy, education, environment) and are discrete – i.e. well-enough defined that they can be fast-tracked as supportive early initiatives, laying the groundwork for large scale reform.

The Secretary Generals of each Ministry have identified their current top priorities and a program of improvements for the Machinery of Government (OFO).

⁵⁵ North, Douglass; Limited Access Orders; World Bank, 2007

The strategic priorities were identified as:

- Sustainable Economic Development
- Education
- Sustainable Social Development
- Technological Development
- Capacity Development for Public Management

The action plan for implementing the priorities focus on:

- Improved HR management with a strategic focus and new HR tools and policies
- Consolidation of physical locations
- Introduction of greater (basic) technology and e-government
- Capacity development (focused on collaboration and policy development)
- Alignment of mandates and clarification of roles and responsibilities
(Machinery of Government review)

The Plan notes the importance of an effective HR plan for the public sector. Implementation of this plan will rest largely in the hands of government leaders and staff. Investing in their capacity will be critical if the plan is to be implemented across a number of years. History shows that political leadership and senior Public Service leadership can be of limited duration. A capable senior management within the Public Service is the most significant investment that can be made for the NDP, and its success will rise, or fall, based on that capacity.

Citizen responsiveness will be at the heart of public sector reform. Strengthening capacity for planning within Ministries, introducing a government-wide performance framework are all vital for both implementation of the plan as well as for effective public sector reform. However these will all be made more powerful if tied to an outward-facing program, such as a Citizen's Charter.

These charters typically publish targets and standards for all public services, and Ministries are re-aligned to meet these demand driven indicators. The Ministry of Finance has already introduced a number of initiatives in the area of better financial management during the last two years, including:

- Improving the social security system; controlling costs, evaluation and implementation of reorganization measures
- Providing insight into the SVB budget;
- The alignment of the annual national budget with the financial standards , such that deficits are covered as much as possible;
- Further improvements of the budget policy as well as the multi-year estimates;
- The timely completion and presentation of auditors and the associated annual report (in other words, revising the legal deadlines for the completion of the financial statements);
- Improving the timely delivery of the monthly and quarterly reports ;
- Structuring the Corporate Sector;
- Preparation of new policy and dividend policy for optimizing the public corporations;
- Simplifying the tax system by January 1, 2015/2016;
- Strengthening the tax organization and increasing tax compliance;
- The conclusion of international treaties in the field of taxation;
- Initiating the OFO project;
- Strengthening financial management;
- Evaluation of the Code of Corporate Governance.

One area of good governance is linked to the funding and oversight of foundations. Over 1,000 Foundations and Associations are in operation, many funded by government and involved in the execution of public policy. However, these foundations tend to be created based on an apparent need of an individual, or small group, and the net effect is of hundreds of initiatives, many worthy, all pulling against one another and acting in isolation. Government supports these foundations with funding amounting to 125 M ANG, but appears to have insufficient certainty on results or desired outcomes.

The first is an effort to consolidate and increase the effectiveness of foundations. A new approach to their operations will achieve reduced costs, reduced fragmentation, and will provide greater control over desired outcomes.

The ongoing National Youth Development initiative provides an approach which will prove highly effective in this regard. The project has proposed the development of a Positive Youth Policy, cross-cutting through 5 thematic and sectoral areas, as evaluated against several internationally recognized sets of indicators. What is specifically important is that it is supported by a process of capacity development through the facilitation of action learning sessions, which contribute to changing attitudes and building trust, thus promoting cooperation.

The new approach will be based on government issuing proposals based on the agreed Youth Policy, invite foundations to apply for funding to achieve prescribed outcomes, and be held accountable against the indicators for effectiveness and efficiency. In taking this approach it's anticipated that only those Foundations with critical mass and demonstrated efficiency will be in a position to win funding. Government will be able to establish more control over policy and results, even while freeing up agencies to be creative in their policy execution, reducing the number of government funded Foundations, and creating budget savings for reallocation.

This table outlines initiatives from the Public Service:

Table 17

Ministry	Priorities supportive of Good Governance & Leadership
AZ	<ul style="list-style-type: none"> • Integrity recommendations Transparency International • Better quality of legislation • Digitalization of legislation • Transparency via effective communication (internal and external) • Promote unity of policy: policy coordination • Integral working system: National Youth Action Programme
BPD	<ul style="list-style-type: none"> • HR Strategy • IT Strategy • Institution for protection of personal data (College Bescherming Persoonsgegevens) • Support of planning, NDP, Central Planning Unit • Code of Conduct/Whistleblower • Strengthening of the central purchasing organization/system • Foster external communication

Ministry	Priorities supportive of Good Governance & Leadership
Health, Environment and Nature	<ul style="list-style-type: none"> • Raise awareness on health, environment & nature. • Integral prevention • Laws and regulations • General health insurance & governance structure
Finance	<ul style="list-style-type: none"> • Integral and interactive budget preparation • budgetary framework linked to real/feasible policy priorities through all ministries • Master Plan • Capacity Development • Project System for Basic Registration and Central Planning Agency/Bureau • Effective, efficient, accessible and affordable government: improve financial management • Policy based budget (governance programme) • Substantive feedback on a timely matter • Separation budget between personnel and resources • Courses line management and financial workers on financial management • Integral and interactive budget preparation
Justice	<ul style="list-style-type: none"> • Fight corruption • House rules for each Ministry. • Review and clarification of Ministerial mandates, roles and responsibilities, and outdated legislation, to ensure clarity and relevance of tasks. • Clear policy on the basis of O.G.V.
SOAW	<ul style="list-style-type: none"> • Improve service to the citizen • Strengthening of the core business of SOAW • Attention for internal organization • Supporting policy (flankerend beleid)
VVRP	<ul style="list-style-type: none"> • Good governance Internally • Data driven, quality management • Integrity • Commitment to Innovation

Committed and future projects related to the four areas requiring strengthening are listed (or suggested) below:

Table 18

Area to be Strengthened	Initiative	Responsible Party
1. Political capacity a. The capacity to develop costed policy platforms; b. The capacity to negotiate and operate coalitions; to work across political divides; c. Strengthened transparency and ethical standards d. Expertise on commercial objectives for SOEs, PPP options, and clarity on the related governance, regulatory and business model decisions	Negotiation skills Policy Development Creation of agency to carry out costing of policy platforms Code of Conduct PPP training and workshops	Political parties, external advisors, international experts, WB
2. Strengthened media scrutiny and reporting: the capacity of media to report on policy platforms and their implications during elections, as well as issues during governing periods	Workshops and training for media on policy platforms	External advisors, international experts, UNESCO
3. Informed public debate during elections, and during administrations. a. Citizens increasingly voting on preferred, national policies	Communication campaign Media discussion on policy platforms Neighbourhood dialogues	External advisors, international experts, AZ, BPD
4. Institutional capacity – the political nature of the HR system of the public service complicates the alignment of citizen interests to service delivery, and cross-Ministerial cooperation. The following elements should be strengthened: a. Focus of public service to be citizen responsiveness b. Machinery of government review c. Depoliticizing HR system d. Performance Management Framework e. Strategic and Business Planning	As described in Table 17	

Budget and Investments

For most countries budget drives strategy. Whether or not this is true in Curaçao, one insight remains – having funds designated and approved in the budget is critical for implementation.

A few assumptions shape the budget for the planning period of the NDP.

- That the operational budget (wages, Operating & Maintenance [O&M] and minor capital) will remain flat or reduced.
- That major capital government projects will be funded via the Netherlands and with the approval of the supervisory board.
- That projects must be both capital and in the public good domain (definitions to be worked out between the government and the supervisory board)
- That commercial capital projects (including those for government owned companies) will need to be funded from within the company, either through sales of ownership (minority or majority), issuance of debt, or through profits.
- One exception to the above may be not-for-profit government companies (such as Selikor, Aqualectura, Cpost etc)
- That a development fund will be used to provide supplementary funds for capital projects on an investment basis
- That the Tourism strategy, as a focus for economic growth, will concentrate on “soft” initiatives (marketing, service, branding) rather than hard investments (new hotels, attractions, restaurants) in the short to medium term
- That no large exogenous shock occurs

Table 19

Budget and Estimates for Government Operations of Curaçao		
'000,000 ANG	2014	2015
Ministry of Plenipotentiary & Parliamentary Agencies	52.3	52
Ministry of General Affairs	47	53.8
Ministry of Planning	189.4	184.3
Ministry of Justice	231.9	231.2
Ministry of Traffic, Transport, and Urban Planning	64.8	86.4
Ministry of Economic Affairs	61.3	50.3
Ministry of Education, Culture and Sports	331.5	360.5
Ministry of Social Affairs	141.1	160
Ministry of Health, Environment and Nature	326.6	340.8
Ministry of Finance	249.6	195.1
TOTAL	1,695.5	1,714.4

The citizen services of health, education and justice (policing, prisons, etc.) dominates the operating budget of government. The operating expenses are targeted for reduction in the near future (beginning in 2016) with a reduction in personnel and the wage bill, primarily through attrition.

The capital budget is focused on the new hospital, along with roadworks, supplies and solar panels for schools, the Marie Pompon public beach and community centres.

Table 20

Capital Projects				
'000,000 ANG	2015	2016	2017	2018
Hospital	127.4	162.7		
Roads, Signage, Lights	60	60	60	60
Schools (computers, solar panels. Etc)	29.9	23.2	23.2	23.2
Police, Fire, Prison	17.1	17.1	17.1	17.1
New tax IM/IT	16	11	1	0
Community Centres	10	10	10	10
Marie Pompon Beach	9.5	0.5	0.5	0.5
Government Building	5.4	49.6	50.9	0
Other	66	60.8	56.9	59.3
TOTAL	341.3	394.9	219.6	170.1

The other major expenditure of government comes in the form of transfers and subsidies, both to not-for-profit foundations (many of which are executing government policies) and to commercial interests.

Table 21

Transfers and Subsidies				
'000,000 ANG	2015	2016	2017	2018
Not for profits (Foundations)	124.8	124.8	124.8	124.8
Other transfer and subsidies	304	303.4	303.4	303.4
Total	428.8	428.2	428.2	428.2

Given the constraints surrounding government finances, the funding for the initiatives for the NDP will either come from within existing O&M funds, or will be funded by private debt/investment.

Budget for NDP Initiatives

Capital investments will be required within the areas of Education, Economy and Sustainability. All areas will require consultancy support, and some IM/IT (which can either be minor or major capital expenses). The largest expenditures will be required from private funds for the upgrading of equipment and infrastructure, either within utilities or within industrial service businesses. The LTES report outlined a budget for short-term priorities which provides a baseline for this budget.

O&M (Operating and Maintenance) and Minor Capital Budget (\$ '000 USD)

Table 22

Initiative	2015	2016	2017	2018	2019
National Identity	Youth Development	50	50	tbd	tbd
	Crime Reduction	225	200	50	Tbd
	Urban Planning	25	90	75	Tbd
Education	Consultancy assistance	250	250	75	Tbd
	Adult Learning	50	50	25	Tbd
	Communication	75	75	25	tbd
Economy	Tourism (CTB)	30	10,000	10,000	10,000
	Business friendly policies and systems	200	300	175	50
	Diaspora		50		
	Entrepreneurship		50	75	50
	Financial Services & Products	50	175	150	100
	Labor regulations			75	
	Governance & Business Model reform of SOEs	125	250	500	125
Governance	Public Sector reform advice and implementation	50	50	125	275
Sustainability	Public awareness and education	275	275	275	275
Total		1,375	1,865	1,625	875

Note that investment in an evaluation framework for Foundations delivering government policy should result in a reduction of foundations and a budget savings. A ten percent reduction will free up 12 M ANG, which can be invested in other policy areas.

Most of the costs above are for external consulting support. Software and minor capital costs are included in public sector reform, business friendly systems (automation of permits) and in crime reduction.

Capital Budget ('000, USD)

Table 23

Initiative	2015	2016	2017	2018	2019
Education	New Child Friendly School		To be determined (funded from sale of old schools)		
Economy	Tourism				
	CDM	500	1,000	1,500	1,680
	Harbor	250,000 ²			
	Airport				
	Refinery		1,000,000	1,000,000	500,000
Sustainability	Renewable energy	4	20		
	Water and Waste water				800,000
	Electricity grid				1,000,000
	Waste Management		3,000	2,400	6,800
	Marine Protection	7			250,000 ³
Total	511	254,018	1,003,900	1,008,480	2,550,000

² as outlined in Harbor Policy document

³ these costs to be incurred in 2021 time frame

The capital costs have been estimated in sectoral plans and entirely dependent on private sector funding or, for the utilities, either private sector investment or issuance of debt. The exception is \$20 M (16.8 M Euros) being provided by the European Development Fund for renewable energy investment. This is not limited to, but can be used for, capital spending.

Overview of Priorities

Specific action plans for each theme are included in the Appendix of this document. The following table outlines the priorities and dependencies of the major activities in each area. Note, the order is not suggested because one sector is of more importance than the other. It is suggested for the following three reasons;

- Large-scale change cannot be achieved on all four fronts simultaneously. Government does not possess that level of resources, either human or financial;
- Economic reform will provide the resources to invest in education and national identity initiatives. Education reform will take longer but will be needed to meet the growing employment opportunities;
- Political and public sector reform is critical but is a complex and sometimes intractable reform. Success in economic and education reform will provide “lessons learned” which will inform and shape political reform.



Figure 26

The dates suggest the years in which that area for implementation will be the primary focus, and does not suggest that nothing will be done in other areas.

Table 24

Economy	2015	2016	2017	2018	2019
Implement Tourism Master Plan	x	x			
Harmonize IFS legislation and negotiate new tax treaties		x			
Streamline permits, visas and licenses	x	x			
Invest in renewable energy and greater efficiency in water and electricity delivery & use	x	x	x		
Introduce greater competition		x	x		
Labor market flexibility		x	x		
Work with SOEs on business models to encourage capital investment	x				
Encourage return of diaspora			x		
Launch development fund	x				
Foreign Investment		x	x	x	x

Education	2015	2016	2017	2018	2019
Early Childhood programs	x				
Review of current education system with UNICEF/UNESCO		x	x		
Adult education (vocational accreditation)	x				
Review of vocational institutions			x		

National Identity	2015	2016	2017	2018	2019
Reduce gender based violence	x				
National Youth Development	x				
Reduce income inequality			x		
Dialogues on vision	x				
Justice Reform			x		
Celebrate National Heroes	x				
Improve Health indicators				x	

Good Governance	2015	2016	2017	2018	2019
Respond to Transparency International Report	x	x			
Implement OFO	x	x	x		
Centralize government staff				x	
Introduce e-government processes				x	
Invest in HR capacity		x	x		
Design and Launch PS Reform program					x

Sustainability	2015	2016	2017	2018	2019
Improve water management			x		
Reduce cost of electricity	x				
Invest in waste management		x	x	x	
Invest in renewable energy	x				

See the Appendix for specific activities and responsible Ministries.

Implementation

Implementation of plans has been a weakness of both the political and administrative institutions for a number of years. Some stakeholders suggested that the implementation of the NDP should be legislated, or put into the constitution as a requirement.

This legally-bound approach is not recommended. Over the next five or more years circumstances will change, new challenges will emerge, requiring a shift in strategy. Future administrations can't be hand-cuffed to an unsuitable set of actions. However many countries do legislate a planning requirement – both at the national level and at the individual Ministry or organizational level, tied into a performance management framework, including Key Performance Indicators (KPI's) and annual reporting and evaluations.

The following observations are made, which will be important in the consideration of how best to implement the NDP:

- The bulk of the actions identified in the plan lie in the hands of the public sector, along with the budget;
- The management information required to monitor and adjust the plan equally lies in the hands of the public sector;
- Authority to direct government employees is a vertical authority (and thus no one Ministry will be able to effectively implement on its own);
- Curaçao is a democracy, and thus the Council of Ministers, reporting to Parliament, holds ultimate responsibility for implementation;
- The private sector, unions and NGOs have an important role to play, particularly with the Tripartite approach at work in the nation;
- Ultimately citizens need to want the NDP and hold their politicians accountable;
- All parties will be dependent on effective monitoring and evaluation of the plan, with regular reporting.

Best practice amongst implementing countries include:

- High level political support
- Involvement of the private sector and NGOs
- Coordination between Ministries
- Access to high quality management information
- Integration into the annual budget cycle
- A central office reporting to the political steering group
- Regular reporting
- Integration into sectoral planning

The design for implementation should be a “made in Curaçao” answer, addressing some of past implementation challenges:

Table 25

Issue to be addressed	Design options
Short-term political decision making (political administrations and Ministerial postings have typically been of short duration)	Ensure collective decision making at Ministerial level Ensure robust external stakeholder input and role Gain buy-in from all political parties Ensure public is aware and supportive of plan
A bureaucracy which has political appointments and affiliations at senior levels, sometimes complicating cross-Ministerial cooperation.	Ensure the structure and process involves inter-Ministerial teams. Give authority for process management to a dedicated agency with expertise and mandate for planning and reporting on national plans
A bureaucracy without sufficient capacity for planning, process management, access to management information, or capacity to evaluate.	Make Ministerial and organisational planning a performance requirement (part of annual performance appraisals) Provide capacity development for all staff (part of BPD's mandate) Complete data input into national socio economic database. Use logic model from SDG goals, targets, and indicators (as localized for Curaçao) for evaluation. Delegate responsibility for evaluation to external stakeholders
Budget, in the absence of a national strategy, will drive strategy.	The NDP must move from a “one-off” plan to a rolling plan, integrated into Ministerial annual and multi-year plans and integrated into the annual budget planning cycle.
Fragmentation and overlap of initiatives, teams, processes, frequently requiring the efforts of a limited number of the same people.	Avoid creating new structures and processes as much as possible. Use existing mechanisms where possible.

A number of examples from a variety of sources were used for discussion and debate, as inspiration for a “made in Curaçao” answer. In the discussions the following functions were identified as critical features in the structure, and process:

Feature	
Authority/Accountability	Who has the authority to make decisions? Who has the authority for directing people? To spend money? From where is it derived? Typically this authority is mandated in legislation and accountability is exercised through “long-route” (citizens at ballot box) or “short-route” (senior managers or Ministers through hiring and firing authority)
Information	Who has access to the management information required to both make plans and policy, and to monitor progress?
Funding	Who has the funding to implement? And who has the authority to sign off on the funding decisions?
Oversight/monitoring	Who has the authority, information and responsibility for ensuring progress is being made, and measuring that progress?
Consultation/external input, advice, expertise	What role do external stakeholders play? Who chooses them? How are they compensated? What is the purpose of their advice?
Coordination	Who has the mandate for coordination along the process chain?
Execution Capacity	Who holds the levers for actually executing on action items?

After comparing three or four models, stakeholders and the UNDP team proposed this implementation design

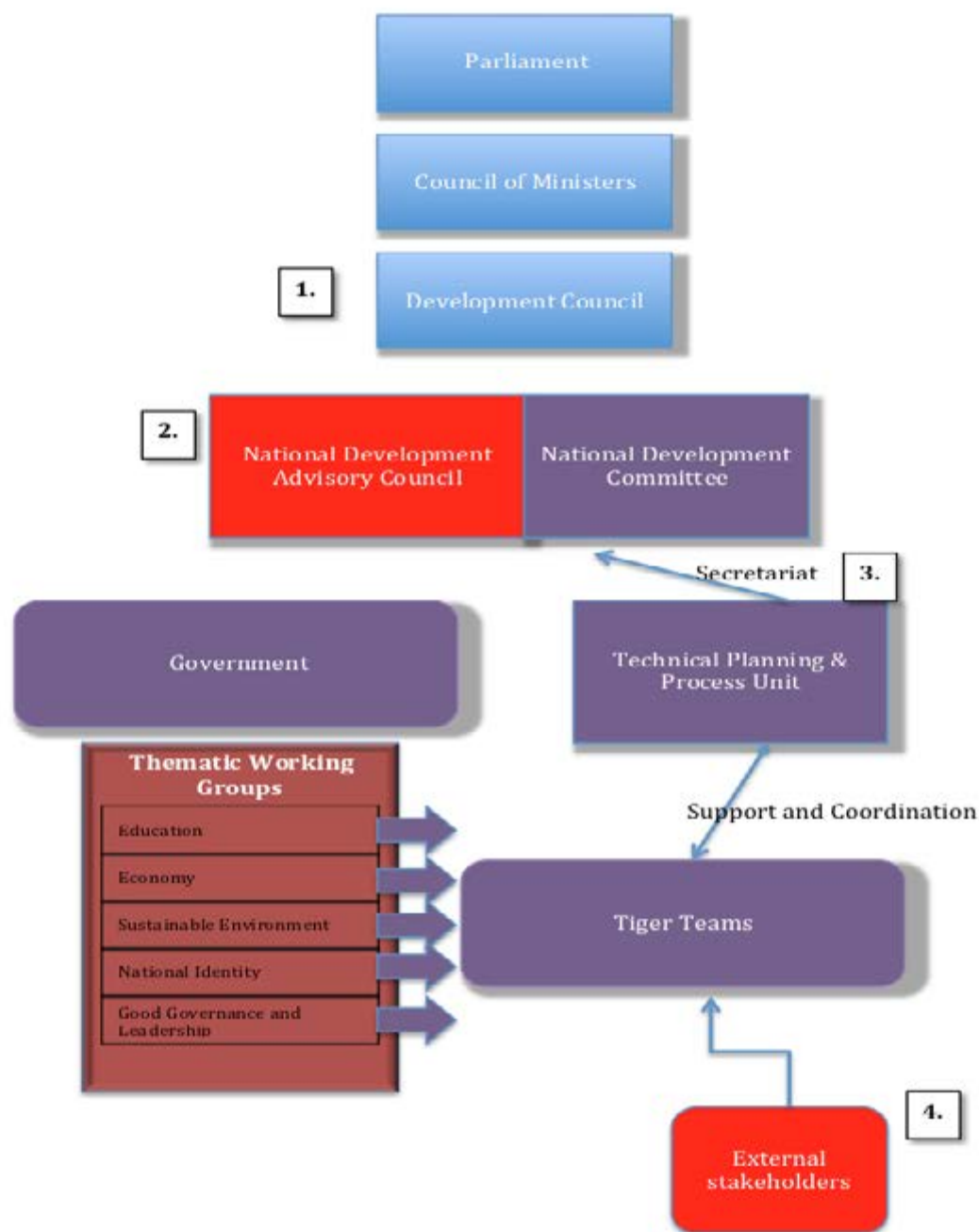


Figure 27

Colour coding: Blue; Political; Red; External Stakeholders; Purple; Government. The Thematic working groups has been shaded brown to represent the possibility of a mixed external and government membership.

Table 26

Unit	Membership and purpose	Design Options
National Action Council	A sub council of the Council of Ministers made up of those with Economic responsibilities (Finance, Economy, Prime Minister, VVRP) to oversee the formation of future NDPs and implementation decisions on the current NDP	<p>The Council of Ministers could fill this role. However it is advisable to have a sub-council of perhaps four members with only one focus, to ensure decisions are taken collectively and quickly, holding one another to account.</p> <p>Decision #1 on the chart</p>
National Action Advisory Council	Made up of external stakeholders holding expertise, status, and a commitment to support both the planning process and the implementation process. They should also have responsibility for monitoring and evaluation, the latter to be conducted by an external, independent body. They should also be skilled in providing strategic foresight advice.	<p>The members should be nominated for 1-3 year terms. The nomination process can be carried out by the Council of Ministers (as supported by the technical secretariat) or through the existing TriPartite mechanism. A range of voices, positions, age and expertise should be considered (business, export, union, economists, educators, etc). However the membership should be small enough that meetings can be conducted efficiently.</p>
National Development Committee	Made up of senior Bureaucrats, especially those with coordinating and economic portfolios (both core government senior managers and arm's length government officials, as appropriate). Has coordinating, oversight and policy advice role. Supported by Technical Planning Unit.	<p>This can be a separate committee to the Advisory Council, or it can be a blended committee. The accountability of this group to the Council of Ministers and Parliament is distinct to that of the advisory board and most countries keep this separate. However the size of Curaçao and urgency of the task may incline the choice to a merged platform.</p> <p>Decision point #2</p>
Technical Planning and Process unit	Consists of skilled professionals in planning, policy, advice, coordination and process management. Duties include pulling the rolling NDP together each year, providing secretariat support to the Advisory Board/Committee, and liaising with implementation teams for progress and input for the next planning cycle.	<p>This can be a separately mandated agency, reporting to Parliament or the NDC, with its own legislation. Or it can be a unit within a Ministry with a mandate for planning (BPD or Finance) or coordination (AZ). Whichever decision is taken it will take a year to form and staff and train. Some form of this function will need to be operational in a transition phase, using consultants or seconded government staff.</p> <p>Decision point #3</p>

Unit	Membership and purpose	Design Options
Tiger Teams	Tiger teams are traditionally project based multi-skilled teams brought together to solve a problem or create change. They are, by nature, transitory and focused on the project. It is suggested, for this NDP, that five teams based on the areas for change be created. Sub teams could also be used (for instance a team focused on Foreign Investment for SOEs could be one such team in the Economy area). These teams will be responsible for implementation – either carrying out the necessary tasks (e.g. drafting legislation) or ensuring it is carried out.	<p>Usually these teams are government staff, seconded full or part time, with input and advice from consultants or external stakeholders. Curaçao could opt for a mixed team of government and external, but the accountabilities will also be mixed and could complicate progress and time that can be dedicated to the project. It will be important to engage an experienced planner as senior manager.</p> <p>The teams should be given budgets, deliverables, timelines and authority.</p> <p>Decision point #4 is the makeup of the teams.</p>
Use of existing platforms		<p>One last decision will be focused on whether to use, as much as possible, existing platforms and mechanisms, or whether to create new arrangements.</p> <p>Decision point #5</p>

The proposed structure has been designed to address the challenges particular to Curaçao as well as lending itself to being institutionalized. Eventually the tiger teams will be supported by institutionalized Ministerial planning, which informs the budget plan, and is routinely forwarded to the Technical Planning unit for consolidation and the senior Councils and Committees for approval, amendment and review.

A reiteration of the decisions to be taken:

1. Whether to have a sub-council of Economic Ministers and Prime Minister to serve as the National Action Council, responsible for oversight of implementation and planning, or to have that role the responsibility of the Council of Ministers. A smaller group is recommended.
2. Whether to have two separate councils/committees (one external and one government), the external to provide expert advice to the NDC, oversight, monitoring and evaluation, and an internal one which ensures implementation, planning and policy implications are carried out, or to have a merged platform. A merged platform provides a range of voices and coherence, but will involve mixed accountabilities (the external members have distinct relationships, liability and authority compared to government staff). It may be that a merged platform is needed in the early implementation phases, to be revisited in subsequent years.
3. The Technical Planning and Process Unit will need to be formally established, staffed and funded during 2016. It could legitimately be housed within any one of several Ministries (e.g. AZ, Economic Affairs, Finance, BPD) or established as a separate agency with founding legislation, budget and reporting structure.

This could be ministerial (e.g. reporting through a Minister or directly to the NDC) or it could be an agency of Parliament, which would provide it a measure of independence. It will need to have some protection of its budget and authority, and will serve as the secretariat and support agency to the merged stakeholder platform, as well as a resource to the tiger teams.

4. The tiger teams should be staffed with experienced individuals, familiar with the field (tourism, international finance, education or financing for the SOEs) and a decision taken on whether the teams should be government, taking input from external stakeholders, or mixed teams.
5. Existing structures and platforms should be identified for possible use as implementing mechanisms and coordination units.

The intention is to begin implementing priority projects early, so implementation will no doubt precede structure in 2016. Authorities will need to operate in parallel – one or two tiger teams should be instructed to proceed with a few projects (likely in the economic sphere) even while some resources should be focused on establishing the technical unit, the formation of the Advisory Board, their by-laws, and a senior coordinating function. The nature of this NDP was to focus on existing plans, make execution a priority, and to select priorities which would lead to long-term development.

Over time the NDP should be stretched, in terms of vision and time frame, while the implementation unit should be focused on the institutionalization of planning, and the linkages between annual planning and budgets, to the NDP, through Medium Term Planning Frameworks:

This section should be read in conjunction with the Implementation Roadmap as provided.

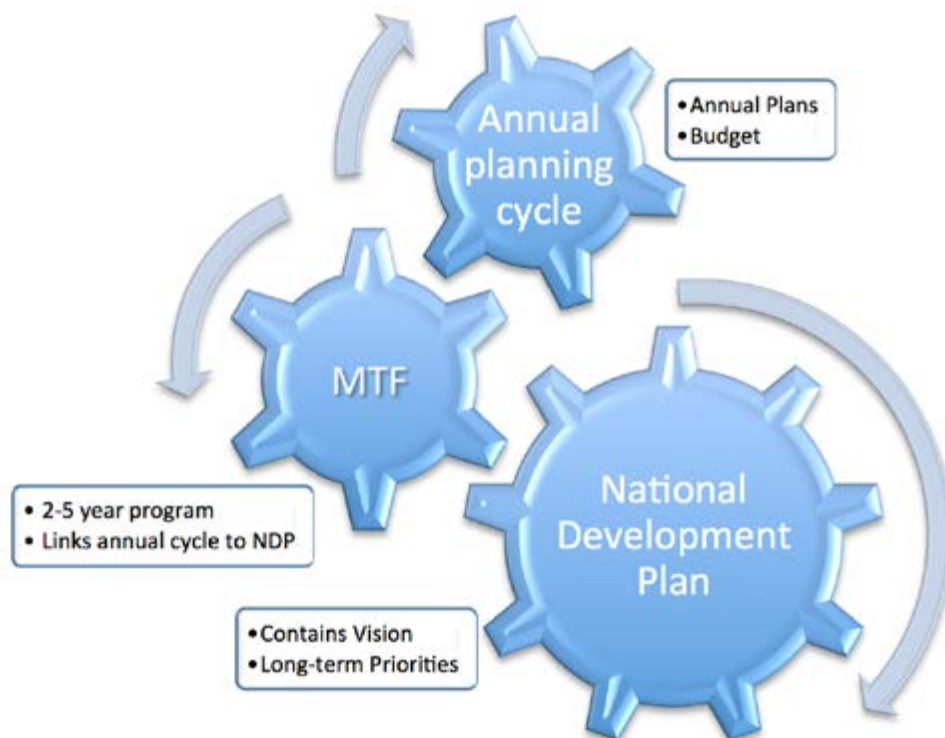


Figure 28

Implementation Roadmap

A process roadmap, with early actions, is provided below as a starting point for implementation. The details can be altered as circumstances dictate, but establishing the committees and councils, early economic and education priorities, along with capacity development, will be key.

Table 27

Implementation Roadmap for NDP - Process Stages for first year															
		Lead Responsibility	Key Stakeholders	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Form National Councils/Advisory Committees	PM, Minister of Economy, Minister of Finance	TriPartite Council, Council of Ministers												
	Nominations														
	Terms of Reference														
	Confirm early priorities														
	Decision if transitional group needed for early progress														
	Ratify with Council of Ministers														
	Establish budget														
2	Establish Tiger team for Economy	National Development Council (NDC) and National Advisory Committee (NAC)	Minister of Finance, Minister of Economy, Prime Minister, Tripartite												
	Taskforce on Tourism - marketing, airlift, increase revPar														
	Taskforce for IFC														
	Taskforce for PPP/investment for SOEs														
	Continuation with MDP teams refinery options														
3	Establish Tiger team for Education	National Development Council and National Advisory Committee	Minister of Education, Minister for SOAW, Minister of Economy												
	Early priorities on vocational training														
	Establish supervisory board for Labor liaison														
	Begin planning for long-term reform														
4	Communication Plan	National Development Council and National Advisory Committee	Community Leaders and SGs												
	For public, on process and priorities of NDP														
	For stakeholders who could be involved														
	For public service														

5	Transitional Structures	National Development Council and National Advisory Committee	SG Council, SGs of AZ, BPD, MEO																	
	Identify existing platforms and mechanisms for short-term purposees																			
	Reformulate or use as base for recruitment																			
6	Set up Technical Planning and Process Unit	Council of Ministers and NDC/NAC	SG Council, SGs of AZ, BPD, MEO																	
	Determine staffing requirements																			
	Write job descriptions																			
	Make reporting decision																			
	Hire manager, then staff																			
7	Capacity Development	Council of Ministers and NDC/NAC	SG Council, SG BPD, external resources																	
	For Technical Unit																			
	For government staff																			
	For external stakeholders (NAC)																			
	For Tiger Teams																			
8	Establish remaining Tiger teams	Council of Ministers and NDC/NAC	SG Council, SGs AZ, MEO, Finance, VVRP																	
	National Identify																			
	Sustainable Environment																			
	Good Governance																			
98	Policy and Regulatory Development	Council of Ministers and NDC/NAC	SG Council																	
	Tiger team from government to work on required approvals, legislation or new policies related to implementation																			
10	Introduce Planning and Performance Framework into Public Service	Council of Ministers and NDC/NAC	SG Council, SG BPD, AZ																	
	Research best practice																			
	Write policy and framework																			
	Capacity development																			
11	Capacity for achieving results	Council of Ministers and NDC/NAC																		

Conclusion

Creating long-term plans is becoming somewhat discredited in the private sector and even the development world, because the time horizons and ambitions are such that they often surpass reality.

However there is still value in forming a vision for change, one where citizens can catch a glimpse of the possibilities, and join in the momentum towards that future.

Execution of this plan would result in GDP growth of between 2-5%, and an increase in employment of over 10%, both permanent and temporary. The largest risk facing the NDP is one of implementation – and one that will depend on the capacity and cooperation of the PS to execute and advise; of current and future politicians agreeing to the long-term direction outlined here; of a certain level of political administration stability to see through change; of citizens owning the vision and holding those responsible to account; and of the private sector seizing opportunities to grow the value of their company, and invest in their staff.

Ongoing dialogues and engagement with the neighbourhoods, along with the initiatives outlined in this plan, should maximize the chances for success.

Appendices

Summary of Neighbourhood Dialogues

(Bándabou, Mei Mei, Prensa, Bándariba)

National Identity

- National education has to be restored.
- Stop stereotyping. Recognize people as people and that will help stimulate us to a national identity.
- Improved communication between neighborhood organizations and the government.
- Involve the whole population of Curaçao in the development, by giving its own worth to put its input based on each individual's ability and status.
- Create plans for neighborhoods and communities for development and present this plan to the government to eventually receive approval to implement these plans.
- Know your history.
- Define and identify our national identity.
- We have to comprehend/understand and realize that our diversity in our culture and language is an advantage to us/gives us an edge.
- Start in the school system (certain specific school subjects).
- The press has to uphold its responsibility and influence to aid in the promotion of national identity as a civic duty and report and explain more on the initiatives regarding National Identity.
- National campaign to confront the community with its incorrect behavior.
- Everyone has to be included and be responsible.

Education

- Teachers should be up to date with innovative teaching methods.
- Goals --> Females reach their goals faster than Males.
- Discipline and education are important for both households and schools, and adequate dress code of teachers.
- Each 10 year a conduct a census, to know who needs social guidance.
- Analyze a system for integration: children, teachers, market, and neighborhoods, material and social. Education has to be done according to the standards of the 21st century.
- Introduce languages from middle school.
- Managing personnel: seek for competent teachers
- Longer school hours, better preparation, diversified curriculum, and teachers also up to par.
- Guidance for parents and involve them more in the education process.
- Long term plan for education and uphold to this plan.
- Holistic approach: change the schedule of lessons after 12.30 p.m. and introduce more art, dancing, sport and vocational training. This will give a broader basis.

- Have certain professional groups support (psychologists and social workers).
- Government to support more initiatives for the formation of parents.

Economy

- Better allocation of capital (funds)/priority for use of capital (funds/priority for capital).
- National Plan has to become a law.
- Concentrate more on cooperation in the way of helping on another with education included
- by giving them opportunities to proof them. Lifelong learning should be an obligation for everyone/ value the local citizens give them opportunities and not according to their appearance.
- Adjust the law to protect the social economic part.
- More dialogue between government and the neighborhoods.

Good Governance

- The government should be more involved in the neighborhoods and each minister needs to come as a representative of the government. If the minister does not comply with this involvement than he/she should be voted out in the next election.
- Start campaigns to inform the public of Curaçao what governing (good governance) really means. These campaigns should take place on short term of time and it has to become a norm for our island.
- It is important to intensify the participation of the citizens of Curaçao
- Good Governance is model that should be implemented in all areas including role models/testimonials and these have to be put in practice in (private) institutions, neighborhoods and also in personal life.
- Good governance is essential in all the themes of the NDP with emphasis in school (education).
- Good governance is instrument for inclusion or exclusion so it has to be tackled.



Sustainable Development Goals

In September 2015 national governments from around the world will meet to formalize the Sustainable Development Goals (SDGs). The seventeen proposed goals have been put forward with the expiration of the Millennium Development Goals (MDGs) in an effort to amend perceived weaknesses associated with the MDGs.

Primarily the MDGs were seen as too focused on the poorer countries, aimed at lifting many from poverty with the assistance of aid funding. They were seen to lack any attention on human rights, gender violence, and didn't specifically mention economic development.

If the MDGs were primarily focused on poor countries the SDGs, in comparison, are meant to be applicable for all countries. Thus the SDGs are more appropriate for Curaçao, a middle income country, and will assist in the monitoring of progress of this NDP.

The seventeen proposed goals (anticipated to be approved later this year):

- 1) End poverty in all its forms everywhere
- 2) End hunger, achieve food security and improved nutrition, and promote sustainable agriculture
- 3) Ensure healthy lives and promote wellbeing for all at all ages
- 4) Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

- 5) Achieve gender equality and empower all women and girls
- 6) Ensure availability and sustainable management of water and sanitation for all
- 7) Ensure access to affordable, reliable, sustainable and modern energy for all
- 8) Promote sustained, inclusive and sustainable economic growth, full and productive employment, and decent work for all
- 9) Build resilient infrastructure, promote inclusive and sustainable industrialisation, and foster innovation
- 10) Reduce inequality within and among countries
- 11) Make cities and human settlements inclusive, safe, resilient and sustainable
- 12) Ensure sustainable consumption and production patterns
- 13) Take urgent action to combat climate change and its impacts (taking note of agreements made by the UNFCCC forum)
- 14) Conserve and sustainably use the oceans, seas and marine resources for sustainable development
- 15) Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification and halt and reverse land degradation, and halt biodiversity loss
- 16) Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
- 17) Strengthen the means of implementation and revitalise the global partnership for sustainable development

There are an associated 169 specific targets for these 17 goals. The NDP indicators and goals have been linked to the SDGs to provide an overall framework for monitoring and evaluation. Further work will be need to link the NDP indicators and goals to specific SDG targets when they are finalized later this year.

Monitoring and Evaluation

The plan must be monitored and evaluated on a regular basis, with reports provided publicly. Best practice is summed up from “Looking Beyond the Horizon” Guidelines and Best Practices in Formulating National Vision, UNDP.

“Monitoring and Evaluation (M&E) makes it possible to coordinate actions within the government, the private sector, civil society, and international partners, as well as to assess progress in achieving the NDS goals and to adjust mechanisms and instruments in the process of implementing policies and Development Plans.

The efficient administration of M&E must take into account the following features of this process:

- The decisive role of participation by civil society and the public at large in the M&E process. This requires setting up a process of providing information about the obligations that the state takes on, their cost, when and how they will be carried out and what institutions/groups are responsible for their implementation.
- A higher level of transparency and accountability of the implementation process, which implies wide dissemination of the results of the M&E through mechanisms widely accessible to policy makers, decision takers, donors and investors, the public at large, the new media and the experts community.
- Every year the government must present a report on the results of fulfillment of the Vision, which must cite the tasks that have been accomplished and explain the reasons for discrepancies between actual and planned results.
- The M&E of the implementation results must be complemented by an assessment of their effect on the macro-economic situation. This will help determine the degree to which the results depend on specific actions taken by the state.
- The monitoring of the macro-economic indicators must be supported by indicators gauging improvements in the quality of institutions ...

Experiences worldwide point to three different models /patterns of organizing the M&E process:

- Delegating the M&E functions to already existing institutions set up for this purpose within the government
- Establishing a new institution in the form of an administrative or consultative body specifically devoted to monitoring the implementation of the NDS and the Development Plan.
- The third model, widely used, involves the outsourcing of M&E functions to an independent institution, i.e. think tank, consulting company, NGO or international agency.

The four SDGs, along with associated indicators, have been outlined in this plan as the basis for a logic model, and a baseline is being established through the socio-economic database project.

The scoping report by Philip Thomas, 2013, advised establishing an external advisory body, responsible for the monitoring of the implementation of the NDP. It is advised that the Government of Curaçao adopt the third model for M&E, outsourcing it to a third party who reports to this advisory body on progress. It will require the inputs and cooperation of relevant Ministries. It is recommended that the external stakeholder advisory group have the authority to carry out annual evaluations, and that they consider using independent professionals from UNDP or other credible, international teams.

Interviews and Meetings

Organization	Individuals
Parliament	The Economic Council of Parliament
Member of Parliament	Mr. Glenn Sulvaran
Ministers	Members of entire Council of Ministers 2014 - 2016
Tripartite Council Kòrsou Ta Avansá	Former Prime Minister of Curaçao, the Honorable Mr. drs. Ivar Asjes and members of the Tripartite Council Kòrsou Ta Avansá
MEO	
Former SG of MEO	Ms. Geraldine Gaari
CDFI	Mr. George Curiel, Ms. Shereeta Ramcharan, Ms. Maya Elhage
Management and staff at MEO	Mr. Luelo Girigorie, Ms. Zuilaka Mook, Ms. Mariela Olaria-Maduro, Ms. Vanessa Toré, Ms. Monique Bernadina, Mr. Eugene Baart, Ms. Mary-Rose Rosalia
CINEX/WTO	Mr. Ramon Koffijberg, Ms. Rashida Petronilia, Ms. Natalie Petronella, Ms. Agnette Kingswijk
LTES Team	Ms. Zulaika Mook, Mr. Paul Helmich, Mr. Raymond Begina, Ms. Irainety Copra, Ms. Kiara Jesurun and Mrs. Julisa Sluis-Albertoe
Competition Authority	Mr. Albert Scholten
Capital Investment Program	Mr. Michiel van der Veur
Other Ministries & Agencies	
Ministry of Governance, Planning and Public Services (BPD)	Ms. Mariselle Maduro and Mr. Jan de Wit
Ministry of Social Development, Labor and Welfare (SOAW)	Ms. Bernice Calmes, Ms. Donate Philbert, Ms. Yvonne Sliet, and management team (policy advisors) Mr. Roy Martina, Mrs. Emily Fransisca, Mrs. Miosotis Yearwood, Mr. Paul Berkeveld
Ministry of Education, Science, Culture and Sport	Ms. Marta Dijkhoff (SG), Ms. Suzanne Larmonie- van Heydoorn, Ms. Carlien de Witt-Hamer, Dr. Aignald Pannefle, Mrs. Lizette Velder
Ministry of Health, Environment and Nature	Ms. Gera Christina (SG), Dr. Selvin Keli, Mr. Gabriel Murray and Ms. Lucy Tielen-Martes, Mr. Clifford de Lannoy
Ministry of Traffic, Transportation and Urban Planning	Mr. Dwigno Puriel (SG), Mr. Myron Eustatius
Ministry of Justice	Mrs. Desiree Lai-Prommes, Mr. Gerold Daantje, Ms. Gimena van der Gen, Mr. Aaron Merite, Ms. Tiara Hazelhoeff
Ministry of General Affairs	Ms. Stella van Rijn, Ms. Marion Schroen, Mr. Raul Henriquez, Ms. Judric Pietersz
Other Ministries & Agencies	
Ministry of Finance	Mr. Paul Soethoudt, Ms. Elgenia Pieterella,
Central Bureau of Statistics (CBS)	Mr. Sean de Boer, Mr. Mike Jacobs, , Mr. Roeland Dreischor
SOAB	Ms. Cindy Jozefa-do Rego
Central Bank	Ms. Ersilia de Lannooy, Ms. Candice Henriquez, Mr. Eric Matto, Ms. Blanca Beuving, Ms. Shakina Dare
Central Tourist Board (CTB)	Mr. Dino Daal, Ms. Jeanette Hooi-Bonet, Mr. Faisol Ayoubi
Public Prosecution Working Group	Mr. Yoland Silliee
DBB	Mr. Arthur Kibbelaar, Ms. Marion Schroen and Ms. Neelam Melwani
State Owned Enterprises	
Dry Docks	Mr. Errol Martina, Mr. Getmar Caldera, Mr. Jurgen Rodriguez,



Organization	Individuals
Multi-Disciplinary Project Team of Isla Refinery	Mr. Werner Wiels, Ms. Mary-Lou Santiago, Mr. Vernon Daal, Ms. Kristel Salsbach, Mr. Joseph Henriquez, Mr. José van den Wall Arnemann, Mr. Ralph James, Mr. Rubén Roosberg, Mr. Jaime de Sola
Curinde	Ms. Fiorina Hernandez, Mr. Daniel Oleana
SELIKOR	Mr. John Amarica,
Ecovison	Mr. Tim van den Brink
Arbo en Milieu Consult Curaçao	Mr. George Kraaikamp
Aqualectra	Mr. Darick Jonis and Mr. Irvin Hanst
UTS	Mr. Paul de Geus and Mr. Sherman Elias
C-Post	Mr. Franklin Sluis
CPA	Mr. Humberto de Castro
Curoil	Mr. Jamil Lasten
CAP	Mr. Ralph Blanchard

Other Stakeholders	
International Financial Services	Ms. Anuschka Cova, Mr. Hernan Behr
USONA	Mr. Reginaldo Doran, Ms. Sonja Boersma
College financieel toezicht (Cft)	Mr. Cees van Niewamerongen
Union Sentro di Barionan di Kòrsou	Mr. Juny Sluis
University of Curaçao	Dr. Mark Hawkins, Dr. Sofia Sagredo Bruno, Mrs. Lisenne Delgado
Union members (CGTC/SSK)	Mr. Edmond Franciska, Mr. Alcides Cova, Mr. Kenneth Valpoort, Mr. Edward Sint Jacobs, Mr. Carlos Rovelet
Members of VBC	Mr. Hernan Behr, Mr. Bastiaan Kooyman, Mr. Eric Smeulders, Mr. Joop Kusters, Mr. Johan Lieuw, Ms. Bonnie Benesh (consultant)
Members of Chamber of Commerce	Mr. John Jacobs, Mr. Ivan Moreno, Mr. Marcos Cova
National Youth Development project	Dr. Merel Griffith, Ms. Elly Hellings
EU Development Fund	Mr. Ferd Schelleman
Reda Sosial	Mr. Herman George (former director), Mr. Rudy Wijngaarde, Mr. William de Luca,
Consultant Economic Modelling	Mr. Runy Calmera
International Democratic Dialogue Trainer	Ms. Anaí Linares
PAPEP (Political Analysis and Scenario Planning) UNDP	Ms. Antonella Spada

Other Stakeholders	
International Consultant Democratic Dialogue	Mr. Philip Thomas
Amigu di Tera	Mr. Lloyd Narain
UNICEF	Mr. Mark Wijne
SIFMA	Ms. Tamara Salsbach
UNESCO	Ms. Christina Anne Norton and Mrs. Isabelle Vierra-Bermudez
Subject expert	Ms. Rosemary Allen
Subject expert	Mr. Pacheco Römer



Other Stakeholders	
KPEK	Mr. Errol Cova, Mr. Plantijn and Ms. Martha Dijkhof (consultant)
CITCO	Mr. Eugène Rhuggenaath
Subject expert	Mr. Rufus McWilliam
SBTNO	Mr. Donald de Palm
Organization	Individuals
TAS Foundation	Mr. Don Martina and Mrs. Suze Martina-Giskus
Twin IC	Mr. Anthony Saija
CARMABI	Dr. Mark Vermeij
Dean Consular Corps	Mrs. Anne-Marie Pietersz-Powell
Economist Platform	Mr. Runy Calmera (president) and Mr. Roland van den Bergh (vice president)
Global Water partnership	Dr. Natalie Boodram, Ms. Patricia Shako
Democratic Dialogue Team	Ana Maria Pauletta, Bianca Neman, Carl Camelia, Cigaretta Profas, Elton Villarreal, Fiona Curie, Huyona Gerard, Irodice Copra Jamir Barton, Jeanne-Marie Francisca, Jhanriha Anita, Jonathan Jonckheer, Kamir Lopez, Kiara Jesurun, Kim van der Wal Kimberly Ascencion, Kurt Schoop, Lianne Leonora, Lianne Muller, Marilyn Isaac-La Cruz, Mariselle Maduro, Marylou Santiago Mitsui Maduro-Croes, Muriell Mamber, Nancy Winklaar, Narayana Camelia, Natalie Jansen, Nifdely Martis, Nydia Adam, Priscilla de Lannoy-Martines, Raynel Martis, Rayni Rijke, Roxanne de Leeuw, Ryan Quinland Shandy Capella, Shannon Gonzalez, Shannon Pfaff, Syonara Maria, Veroesjka de Windt, Vinita Scorea, Wassef Sokkari, Kiara Jesurun, Prisciliana Christina, Neelam Melwani, Mr. Marlon Regales
Small committee of neighbourhood experts	Mrs. Jeannette Juliet-Pablo, Mr. Kenneth Valpoort, Mr. Vernon Daal, Ms. Roxienne Albertina, Ms. Bianca Neman, Ms. Marylin Isaac-La Cruz, Mr. Elton Villareal, Mr. Kurt Schoop,

In addition, three groups of stakeholders were invited to participate in joint feedback sessions on the first draft.

Selection review sessions Monday March 30th

Name	Organisation
1 Zulaika Mook	MEO
2 Irainety Copra	MEO
3 Nathalie Petronella	MEO
4 Luis Rivas	Director of ISLA
5 Merel Griffith	National Youth Plan
6 Elly Hellings	National Youth Plan
7 Sofia Saveedra	University of Curaçao
8 Clifford de Lannoy	Ministry of GMN/DD Facilitator
9 Werner Wiels or representative MDPT	Project Team Refinery
10 Maya Elhage	CFI
11 Shereeta Ramcharan	MEO/CFI
12 Susan Larmonie v. Heydoorn	Ministry of OWCS

Name	Organisation
13 Carl Camelia	IUC/DD Facilitator
14 Carlien de Witt Hamer	Ministry of OWCS
15 Aignald Panneflek	Ministry of OWCS
16 Marion Schroen	Interim Director Coordinating Unit General Affairs
17 Judric Pietersz	Advisor PM's office
18 Annette Moron	DBB
19 Arthur Kibbelaar	Director of Directorate of Foreign Affairs
20 Juny Sluis	UNSEBAKO
21 Elton Villarreal	JCI/DD Facilitator

Selection review sessions Tuesday March 31st

1	Gilbert Cijntje	ICUC
2	Sidney Justiana	UDC/ICUC ex union leader
3	Shakina Dare	Central Bank of Curaçao and SXM
4	Roxienne Albertina	Director Communications General Affairs
5	Mike Jacobs	CBS
6	Sean de Boer	Director of CBS
7	Ramon Koffijberg	Director of CINEX
8	Marva Browne	SG UNESCO
9	Fiorina Hernandez	Manager Investment Promotion Curinde
10	Su Girigori	Anthropologist/Researcher
11	Iralice Copra	Psychologist
12	George Kraaikamp	Director Arbo en Milieu Consult Curaçao
Name	Organisation	
13	Timo Brouwer	Green Force
14	Myron Eustatius	Policy Director Ministry of Traffic
15	Karel Tujeehut	Manager Corporate Strategy and Business Development Aqualectra
16	Runy Calmera	Economist
17	Edward Sint Jacobs	SSK (Unions)
18	Franklin Girigorie	SSK/ Aqualectra
19	Jason Nisbet	Senior Manager KPMG
20	Paul Helmich	Former Project Manager LTES
21	Elgenia Pieterella	Negoshi Pikiña/Minsitry of Finance

Selection review sessions Wednesday April 1st

1	Lloyd Narain	Amigu di Tera (NGO)
2	Bianca Neman	BE Advancement/DD Facilitator
3	Josephine Provence	Secretary Social Economic Council
4	Miosotis Yearwood	Ministry of SOAW
5	John Amarica	Selikor/BPM
6	Mariselle Maduro	Ministry of Planning
7	Jan de Wit	Consultant/Ministry of Planning
8	Donate Philbert-Nieveld	Sector Director Ministry of SOAW
9	Melwin Smith	CPA
10	Jose van der Wall Arnemann	Director Refineria di Kòrsou
11	Jurgen Rodriguez	HRM Manager Dry Docks
12	Errol Martina	Managing Director Dry Docks
13	Rudy Wijngaarde	Reda Sosial
14	Mark Hawkins	UoC
15	William de Luca	Reda Sosial
16	Dino Daal	CTB
17	Hugo Clarinda	Interim Director CTB
18	Albert Scholten	FTAC
19	Marylin Isaac	Ministry of Finance/DD Facilitator
20	Deva-Dee Silliee	Cura Cares (NGO: volunteers)/DD Facilitator
21	Deva-Dee Silliee	Cura Cares (NGO: volunteers)/DD Facilitator

Bibliography

List of Documents Reviewed for NDP (including but not limited to)

Curaçao's Economic Development Potential	MEO	May, 2013
Country Report – Curaçao	The Economist Intelligence Unit	
Government Finance and Beyond	Lecture, Prof dr Age Bakker, Chairman Cft	August 2014
Future of Isla Refinery, MDPT Status Report to Parliament	MDPT	September 2014
National Report of Curaçao for the Third International Conference on Small Island Developing States	Ministry of Health, Environment and Nature	November 2014
Annual Report 2012	Central Bank	June 2014
Annual Report 2013	Central Bank	August 2013
CIFA Action Plan	CIFA	August 2014
		March 2014
Visions on Curaçao; New Investment Opportunities	MEO	
IMF Staff Report	IMF	2013
National Integrity System Assessment	Transparency International	August 2014
The Situation of Children and Adolescents in Curaçao	UNICEF	2013
Curaçao Maritime Centre	Henry Neoman report	2013
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