



*Rebuilding our city
Safeguarding our future*

CONSULTATION PAPER NO. 1

23 September 2020



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SUMMARY AND KEY THEMES		INTRODUCTION TO REEF			THE PROCESS AND TIMELINE		KEY SOLUTIONS PROPOSED			WHAT WE NEED FROM YOU	
Ease of doing business	Attracting new business and investment	Immigration	Hospital and healthcare	Grand Bahama International Airport	Maritime and logistics	Tourism	Real estate and urban renewal	Small business sustainability	Resilience & emergency preparedness	Education and training	Agriculture

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PLEASE NOTE

This slide deck is neither a report nor a promotional document. It provides a factual and objective briefing to the people of Freeport, and others who have an interest in Freeport, on the context and current work of the ‘Committee For Revitalization and Expansion of Freeport’s Economy’ (REEF Committee).

The deck outlines real solutions that the REEF Committee proposes, to permanently transform Freeport’s economy and set it onto a new, sustainable and far more positive economic trajectory.

Please read it carefully and provide feedback as invited in the final slide: “What we need from you.”

Help us fine-tune Freeport to fit your needs

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Executive Summary

Under the Hawksbill Creek Agreement (HCA) in the 1950s, Freeport became one of the first ‘free zones’ in the modern world. Over the past decades, the city’s regulatory framework and the incentives offered to investors have fallen behind those offered by rival free zones, regionally and elsewhere in the world.

Hurricane Dorian, the worst of a succession of devastating storms to pummel Freeport in recent years, highlighted how vulnerable the city is to storm surges and rises in sea level induced by climate change. If Freeport is to prosper, then it needs to be made safe from storm surges.

Covid-19 has decimated the Bahamian tourism industry, creating dire economic distress for the country as a whole and for many individual Bahamians. Even as the pandemic recedes, it seems highly likely that the tourism industry will be very different in the future. If Freeport is to prosper, its economy needs to be diversified by encouraging significant growth in a range of other sectors, as well as tourism.

Freeport has become a difficult place to do business, especially for foreign investors and workers. The roles of the GBPA under the HCA and Government have become blurred and confusing. Investors face complex and sometimes subjective processes when trying to establish and sustain operations in Freeport. If Freeport is to prosper, these need to be clarified and radically streamlined, in order to successfully compete with rival free zones seeking to attract the same investors that we are.

The Covid-19 crisis, on top of Hurricane Dorian’s aftermath, make it crucial that Freeport’s challenges be addressed and definitively resolved, now. The city’s economy is in a dire state, along with the circumstances of its residents.

The REEF Committee is an initiative created by the GBPA to engage with its licensees and the wider Freeport community to create an action plan (not just an ‘aspirational report’) to fundamentally transform the city.

Albert Einstein is reputed to have said that insanity can be defined as doing the same things over and over again and expecting different results. Many of the solutions that the REEF Committee have proposed will require a radically different approach in Freeport. The GBPA is committed to Freeport’s economic growth, resilience to future shocks and the prosperity of its residents, and is keen to explore all options, in collaboration with Government and the people of Freeport, to achieve those ends.

This deck outlines the key issues and possible solutions that have been identified by the REEF Committee. Your input is sought on these. Which of the proposed solutions do you think would be most transformational to Freeport’s economy and its people? To make it possible to implement the proposed solutions, how does the relationship between the GBPA and Government need to be improved? What incentives need to be offered to investors, to make Freeport more attractive than rival cities and centres that seek to attract them? What needs to be done to ensure that Bahamians benefit as much as possible from the growth that would result?

What options exist to fund measures to safeguard the city from storm surges AND diversify the economy AND optimise the benefits of growth for Bahamians?

Please let us know what you think, by completing the survey on the GBPA website and/or providing written submissions.



12 steps that need to be taken immediately

1. Address the uncertainty and lack of security that all current and future GBPA licensees face with respect to the extension of the tax concessions, namely property taxes and business license fees.
2. Conduct a survey of perceptions of the people of Freeport regarding the content of this deck and analyse the results.
3. Finalise the sale of the airport to Government.
4. Solve the lack of a proper hospital in Freeport.
5. Implement as many as possible of the short-term solutions to enhance ease of doing business for businesses already operating in Freeport.
6. Agree the concept of the 'Blue Economy' as a core brand so that projects already being discussed with investors can be presented in that context.
7. Undertake the comparative assessment of Freeport versus rival SEZ destinations and determine what is required to offer an 'investor value proposition in Freeport' that the investors and businesses that we wish to attract to Freeport perceive as superior to the offerings of rival SEZ destinations. (We already know that a radically different approach to immigration will be required, at least with regard to businesses within the SEZ/s, if they are to be viable.)
8. Pass the necessary bylaws so that GBPA can execute its mandate for environmental protection and urban renewal.
9. Market the Bahamas Extended Stay Visa Programme for persons wishing to work or study from The Bahamas for a year.
10. Resolve the issues regarding Port Lucaya Marina and the Grand Lucayan Resort site, as quickly as possible.
11. Conduct an initial pre-feasibility assessment to determine the viability and implications of an urban storm-surge protection system for Freeport.
12. Create a short term framework and expeditious implementation plan in consort with GoB for existing pipeline projects in agriculture, healthcare, high end hospitality and residential development, and the green and blue innovation sectors.

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Key themes

The REEF Committee’s remit is to create an action plan, not just (yet another) report, so the focus is on specific solutions - not general aspirations and ideas. However, defining and differentiating the ‘value proposition’ that Freeport offers is a fundamental issue that the REEF Committee identified at the outset of this process. Examining the solutions proposed so far, key themes emerge that could form an overall framework and brand. What do you think?

Maritime and logistics theme



The Bahamas is a nation of islands and seas. The maritime economy is well developed and understood. Freeport Harbour and its surroundings offer a long-identified opportunity to develop an industry cluster consisting of a wide range of businesses related to the maritime and logistics industries. If sufficient critical mass could be established in these sectors, this would create the opportunity to brand Freeport something like ‘The Maritime Gateway to the Americas.’ What do you think?



The ‘Sea Air Business Centre’ (SABC) features prominently on the Freeport Harbour website, including artists impressions of what it could look like. Its physical location between a major container port and an airport, close to major international markets, makes it similar in many respects to the Jebel Ali Free Zone (Jafza) in Dubai, which generates roughly \$9 billion each year for the United Arab Emirates economy, sustains >135,000 jobs and handles nearly \$100 billion in trade, annually. The SABC is prone to flooding during hurricanes and restrictive immigration policies limit access that companies wishing to establish there (or elsewhere in Freeport) have to the global talent pool. If these two obstacles could be resolved, what others would need to be addressed in order for Freeport to become and be widely recognised as a major global logistics hub?

‘Blue Economy’ theme



1 billion people around the world live along coastlines where changing ecosystems and frequent climate catastrophes threaten economies and ways of life. Creating systems to sustain these vulnerable communities is more important than ever, and the urgent demand will drive a projected **\$23 trillion market** for coastal resilient solutions. Branding Freeport overall with a ‘Blue Economy’ theme and creating an environment that is especially attractive to companies and others developing such solutions might be a good idea. Many of the REEF Committee’s proposed solutions have a strong ocean component to it and the Bahamian tourism product is inextricably linked to the sea and seashore. It would also link well with the Maritime theme. What do you think?

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The ultimate goal: A thriving, inclusive, prosperous Bahamian city



Many of the solutions proposed by the REEF Committee are interconnected. Projects that focus on safeguarding against stormwater surges, and sea level rise, and reduce over-dependence on tourism would create benefits generally for Freeport, greater Grand Bahama Island and The Bahamas as a whole. For instance:

A far greater contribution to the country's GDP and income to Treasury

For example:

- Allowing a more liberal immigration policy would allow high-income expatriate workers to live and spend money in Freeport and elsewhere in-country, generating very significant work permit and VAT revenues.
- A larger, more prosperous Bahamian population would likewise increase VAT and other income to the Treasury.



Significant increase in job and entrepreneurial (business) opportunities for Bahamians

For example:

- Previous research has indicated that the number of new businesses (e.g. shops, restaurants, service businesses of various kinds) that could be created, could functionally eradicate Bahamian unemployment.
- Increased spending on city amenities and infrastructure would reverse and eradicate the urban decay that plagues part of Freeport, returning derelict properties to productive use.
- Demand for higher skilled workers would reduce the 'brain drain' and allow skilled Bahamians working overseas to return home.



Critical mass of traffic through Grand Bahama International Airport, reducing costs of travel to/from Freeport

For example:

- Significantly increasing both tourist and non-tourist traffic (the latter through more business traffic and a larger population on Grand Bahama Island generally) would reduce the costs per passenger of operating GBIA.
- Increased goods traffic servicing the SABC would reduce costs yet further.



The REEF Committee's remit is focused on finding specific individual projects that can be properly funded and implemented. Once the specific projects are identified, attention can move to building those into a new master plan for the City, well integrated with the rest of Grand Bahama Island, to create a 'model' modern, sustainable, prosperous city that meets and exceeds the quality of life and career/business opportunities offered by rivals such as Georgetown (Cayman), Panama and even some U.S. and European cities. How can this be brought to reality?

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The REEF Committee’s strategic intent

The REEF Committee is an initiative of the Grand Bahama Port Authority, in partnership with leaders of some of Freeport’s leading businesses.

It is intended to supplement and be collaborative with the Government of The Bahamas and to supplement its Economic Recovery Committee (ERC) initiative.

The committee’s strategic intent is twofold:

- (1) To develop a long-term action plan that will fundamentally transform Freeport’s economy, diversifying the economy away from over-dependence on tourism and safeguarding the City and its people against future storm surges and sea level rise.
- (2) To identify short-terms actions that can be taken immediately, to relieve distress and set the City on the road to recovery following the devastation caused by Hurricane Dorian and the Covid-19 pandemic.

The REEF Committee’s objective is to make a profound, sustainable, positive difference to Freeport.

The intent of this report is to brief the people of Freeport on the process and to seek input on the initial proposals that have been generated by the committee.

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The members of the REEF Committee

GBPA contingent

Sarah St. George, Acting Chairman, GBPA
Henry St. George, Executive Director, GBPA
Rupert Hayward, Executive Director, GBPA
Ian Rolle, President, GBPA
Derek Newbold, Senior Manager Of Business Development, GBPA
Deann Seymour, Chief Financial Officer, GBPA
Philcher Grant, Director Customer Solutions, GBPA

Freeport business community contingent

Robert Adams, Consultant, Delaney Partners Law Firm (Chair)
Sean Basden, Taino Beach And Flamingo Resorts
Jeremy Cafferata, Owner, Freeport Ship Services
Darren Cooper, President, Rotary Club Of Freeport
Keith Davies, Chief Executive Officer (CEO), Bahamas International Securities Exchange (BISX)
Greg Ebelhar, Chief Operating Officer (COO), Polymers
Erika Gates, Co-founder, Ecotourism Association
Ellie Hepburn, CEO, Elnet Maritime
Giora Israel, Senior Vice President, Carnival Corporation
Dave McGregor, President And COO, Grand Bahama Power Company
Willie Moss, Partner, Graham Thompson
Claudette Porter, President and COO, Emera Utility Services
James Sarles, Sarles Realty
Sandy Sawyer, CEO, Sawyers Fresh Market
Dave Skentelbery, CEO, Grand Bahama Shipyard
Fred Smith, QC, Managing Partner, Callenders
Godfrey Smith, CEO, Freeport Container Port
Pietro Stefanutti, President, Pharmachem

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The 10-step process

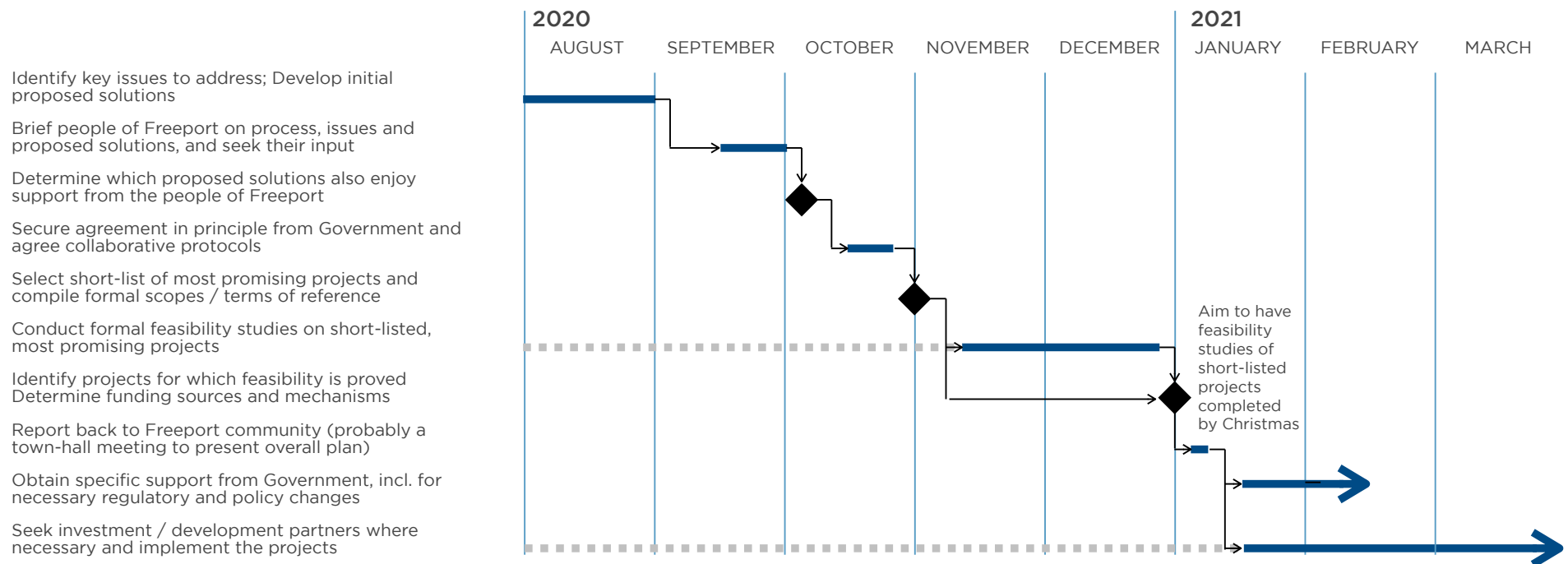
- The process that the REEF Committee is following has been designed to identify projects that are technically and financially feasible, in the best interests of the people of Freeport, and that when implemented will contribute significantly to the sustainable prosperity of Freeport’s economy and its people.
- To deliver transformational results requires bold and courageous thinking, but without being unrealistic.
- The desired outcome of the process is **successfully implemented, economically transformational projects!**



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The timeline

- The REEF Committee is tasked with identifying both long-term sustainable solutions that will fundamentally transform the Freeport economy and short-term solutions to provide immediate relief and stimulus.
- Short-term solutions will be implemented as quickly as that is possible.
- The timeline below indicates the program for the long-term solutions. Our intent is to be into the final phase, namely securing investment / development partners and commencing implementation of major projects, **as early as possible in 2021.**



Key:

- REEF task
- Task already under way by/through the GBPA
- Key milestone
- Dependency (prior task must be completed before next can commence)

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Ease of doing business subcommittee

Key issues identified

- Uncertainty and lack of security that all current and future GBPA licensees face with respect to the extension of the tax concessions, namely property taxes and business license fees. Processes for establishing and operating businesses in Freeport are opaque, confusing and approvals can take a long time to be decided.
- Unnecessary duplication exists between GBPA and Government processes.
- Bureaucratic decisions are sometimes arbitrary and/or subjective, reducing the level of certainty for business owners and investors.

Key solutions proposed (short-term)

1. Negotiate agreement that the GBPA approve specified low-risk business licenses without needing to refer these to the Bahamas Investment Authority (BIA).
2. GBPA to assess/approve right for expatriate permanent residents to work in businesses 100% owned by them.
3. Expatriate investors to have access to the virtual business portal being developed by the GBPA for Bahamian investors. BIA to use this mechanism to apply their notation within an agreed timeframe upon which investors can rely.
4. Clarify when or not a Heads of Agreement (HOA) is required for a foreign business transaction.
5. Include GBPA licensees as a sector of businesses in the Commercial Enterprise Act that qualify for efficient immigration practices.
6. Cease the cost of living index increase in business license fees until there is a turnaround in the economy and cap at 75% above the original license fee amount upon issuance.
7. Applications for restaurants, liquor stores, bars, nightclubs and related businesses to be processed through the GBPA virtual business portal, including Government approvals.
8. GBPA to amend procedures to allow businesses that do not require physical office space to obtain a business license without requiring that they rent approved premises.
9. Annual residency permit application process to be automated through an online portal that allows processing within 48 hours (and eliminates bureaucratic subjectivity/uncertainty).
10. 'Know your client' (KYC) certification process to be streamlined to single submission.
11. Negotiate with banks to develop a clear, streamlined process for approving local bank accounts (link to KYC process above).

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Ease of doing business subcommittee

Key solutions proposed (medium/long term)

1. Enhance banking solutions for international investors and businesses and expatriate workers. Encourage challenger banks to establish in Freeport.
2. Digitalise all administrative and governance processes in Freeport to the maximum extent reasonably possible. Agree with banks to link to their KYC requirements?



Attracting new business and investment subcommittee

Key issues identified

- Freeport lacks an investor value proposition (IVP) that is competitive with rival destinations, hence is restricted in being able to attract FDI/DDI at scale.
- Businesses in Freeport (other than those in the tourism sector) are generally limited to those that service local economy, capitalise on Freeport Harbour and leverage sunk capital from past investments.
- In all but regulatory and socio-political contexts, a strong business case apparently persists for investment at scale in Freeport's business / industrial complex and associated sectors.

Key solutions proposed (short-term)

1. Conduct an objective competitive analysis of Freeport's IVP relative to rival destinations.
2. Research why businesses in Freeport invested/stayed/disinvested.
3. Discover why prospects who explored Freeport and invested elsewhere, did so.
4. Explore opportunities in manufacturing/US 'made in The Bahamas' supply chain for FPO given breakdown in Chinese/US relations and falling EoDB in Hong Kong. Where it is discovered that a bona fide opportunity exists, a sector specific IVP will be developed to support a targeting strategy.
5. Develop a plan that integrates business promotion of Freeport with that in other parts of GBI and, as relevant, other Bahamian islands.
6. Develop and distribute an annual publication for Freeport along the lines of "Cayman Resident: The definitive guide to living and working in the Cayman Islands."
7. GBPA to establish an independent Investment Promotion Agency (IPA) to be overseen by a board consisting of Government, GBPA and selected independent directors. Recruit an investment promotion expert with proven international credentials.
8. As part of the IVP development process, assess viability of SEZs in Freeport, including which industry / business sectors would find Freeport's IVP attractive, what their specific needs would be and how these would need to be met.



Attracting new business and investment subcommittee

Key solutions proposed (medium/long term)

1. Research likely changes to international tax regimes over next 5 years, including likely changes in taxation rates and OECD/similar enforcement measures, to assess likely demand trends for economic citizenship and implications to be managed. (Tax experts to provide advice – cost only incurred if program is encouraged by Government).
2. Assess the conditions that would need to apply to economic citizenship to make it competitive with others offered (e.g. level of investment required) and measures required to protect affected Bahamian communities (e.g. limitations on right to vote).
3. Develop a proper new urban development plan incorporating the most appropriate, modern, sustainable thinking, for Freeport – fully integrated into a similar plan for the whole of GBI.
4. Subject to proven viability, develop RFPs to invite investment in the development of SEZs at scale in Freeport. Choose one sector and develop a pilot approach e.g. Tech or Agri Park.
5. Liaise with the IPA to integrate SEZs into investment promotion activities.



Immigration subcommittee

Key issues identified

- The Government immigration policies in place in Freeport are fundamentally uncompetitive with rival destinations targeting the same businesses and investors that we would like to attract to Freeport.
- Short-term opportunities exist to benefit from 'digital nomads' wanting to work remotely from centres where they can be safer from Covid-19.
- Difficulties with work permits for shipyard workers.

Key solutions proposed (short-term)

1. Streamline and digitize processes relating to Immigration is a necessary first step. Streamline the current process to create a single application for companies wanting to benefit from the new Commercial Enterprise Act (CEA), the Bahamas Extended Stay Visa Programme for persons wishing to work or study from The Bahamas for a year and the benefits attached to the BH1B Visa program related to FDI.
2. The CEA application should be easily accessible as part of a streamlined BIA application/ approval process and promoted as an EODB enhancement on BIA and Gov't related platforms.
3. Create a marketing strategy that clearly articulates the value proposition created by virtue of marrying CEA & BH1B that can be used for strategic prospect targeting.
4. Issuance of a Bahamian passport/travel document (without the right to vote) to qualifying high net wealth individual (HNWI)s and others who make a prescribed investment in The Bahamas.
5. Differentiate between subcontractor work executed outside of the Bahamian economy and contracted by non-Bahamian entities and those engaged by Bahamian firms and working within the local economy for work permit purposes and requirements.
6. No fees or a nominal FLAT FEE for non-Bahamian sub-contractors working onboard vessels in Freeport Harbour.
7. See also under 'Ease of Doing Business' and 'Attracting new business and investment'

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Immigration subcommittee

Key solutions proposed (medium/long term)

1. GBPA's "One Stop Shop" portal has already been established; in support of the premise of the ease of doing business in Grand Bahama, Immigration as well as related government agencies, should be included within the portal's approval cycle, allowing for real time tracking and accountability.
2. Advocate with government on behalf of private sector to introduce and include a transitional path from a work permit, including BH1B visa, to becoming eligible for permanent residency.
3. Business travellers visiting for business meetings, who spend seven days or less in Grand Bahama, should be allowed to enter without applying for a work permit.
4. See also SEZs under 'Attracting new business and investment.' (If SEZs are to be a possibility, immigration policies that are competitive with rival destinations will be necessary).

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Hospital and healthcare subcommittee

Key issues identified

Note: The RAND hospital is a Government facility and the responsibility of Government, not the GBPA.

- Access to modern and first-class healthcare is integral for Grand Bahama and expansion initiatives.
- Freeport lacks effective emergency care, ICU, stabilization and medical-evacuation capabilities.
- Restoring or replacing Rand Hospital facilities damaged in Hurricane Dorian.
- Public health issues e.g. obesity and diabetes.
- Lack of critical mass currently in Freeport for sophisticated medical facilities.

Key solutions proposed (short-term)

1. Private sector to pool demand and agree terms with US and Nassau medical evacuation entities to provide airlift capabilities here in GB in the event of emergency.
2. Improve communication between ICU/Rand and US hospitals, through medical evaluation entity, to ensure that US hospitals will receive patient with acceptable diagnosis.
3. Bring on-island private practice specialists into the medical evacuation program, such as, Dr Winston Forbes.
4. Review the Opa Locka community redevelopment model in Florida.
5. Update building code for critical infrastructure.
6. Facilitate consultation between largest employers on island and private hospital operator, who is already engaged by GBPA, to assess business model for private hospital in GB. Capitation of premiums to be explored.
7. Assist GoB in the procurement of critical equipment such as ventilators, EMS and ambulances. (GBPA to leverage their relationship with renowned medical institutions.)
8. Private businesses to promote health programs at work (Licensees of GBPA.)

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Hospital and healthcare subcommittee

Key solutions proposed (medium/long term)

1. Engage health insurance companies to roll out coordinated Medivac protocol for private sector. Facilitate the opening of a private sector hospital; private owner and operator to develop a full-service hospital here in Grand Bahama. First phase to be operational in 6 months and to utilize Okyanos building and its existing facilities (GBPA, large employers and businesses in GBI.)
2. Ensure appropriate insurance coverage is in place for healthcare facilities.
3. Progress discussions with Keith Davis, CEO BISX, for a listed REIT to develop and own the hospital with Government Public Hospital Authority as tenant.
4. Explore idea of public private partnership (PPP) with private healthcare operator, similar to Nova Scotia models.
5. Advocate for health education in the school system.
6. GBPA to ensure that any new buildings are built to withstand Category 5 storms and 20 foot storm surge.
7. Develop world class medical facilities in Grand Bahama with one or more renowned international health science centers.
8. Refine Covid-19 testing protocols to make travel and diagnosis easier (could be short-term.)
9. Implement Covid-19 tracing app, replicate proven systems used in UK and Ontario (could be short-term.)



Grand Bahama International Airport subcommittee

Key issues identified

- For more than a decade, Grand Bahama International Airport (GBIA) has not had sufficient throughput to make it economically viable at its pre-Dorian scale.
- Aviation fuel prices on GBI are uncompetitive relative to other options.
- Lack of economies of scale have led to higher ticket prices and public misconception that the Grand Bahama Airport Company (GBAC) tariffs are the cause for these rates.
- GBIA is subject to storm surge inundation and, in the case of Hurricane Dorian, that proved devastating.
- The current state of Freeport's economy and the collapse of tourism as a result of Covid-19 renders reinstatement of the airport facilities uneconomical.

Key solutions proposed (short-term)

1. Request Government to amend or enact any legislation that will facilitate the sale of the GBIA to the Bahamas Airport Authority (BAA) in a “peppercorn” sale.
2. BAA to build a new terminal or renovate the previous terminal to a fully functional facility scaled to accommodate the current traffic volumes along with ability to grow as traffic increases.
3. End United States Custom and Border Patrol pre-clearance.
4. Enhance competitiveness of GBIA:
 - a. Promote marketing.
 - b. Extend airport operational hours to facilitate red-eye flights allowing international connections via Nassau.
 - c. Negotiate the management and operation of fuel operations with domestic companies i.e. FOCOL, Rubis, Texaco.
 - d. Enact legislation to end concession and break the barrier that monopolizes the import and distribution of fuel with the Freeport area (i.e. reduce cost of fuel).
 - e. Encourage government to spend a percentage of all tariffs collected on marketing the island and improving tourism product for a defined period.



Maritime and logistics subcommittee

Key issues identified

- Recognizing the criticality of cultivating a brand identity for Freeport, leverage the opportunities of the Blue Economy and become the “Maritime Centre of the Americas.”

Key solutions proposed (short-term)

- Identify the top ten barriers to starting a business and making an investment and work with government to remove them.
- Carry out a ‘strengths, weaknesses, opportunities, threats’ (SWOT) analysis for the Strategy, to develop Freeport into the Maritime of Americas including required actions, for public and government consultation.
- Government / GBPA / Industry to agree to centralize maritime training on the Island. This not only trains Bahamians for the maritime sector but will also attract foreign fee-paying students for short Standards of Training, Certification and Watchkeeping (STCW) courses such as, Survival Courses, Firefighting Courses. It may be advisable to look for an existing industry / educational partner in this sector, to bring expertise and finance.
- In the leisure sector look to provide enhanced marina facilities, to include covered storage and repair facilities with lift in / lift out capability. Explore the possibility of finding a foreign partner as an investor, utilize GBPA provided land.
- Explore opportunity for being a crew change centre for Cruise ships in Bahamian waters.

SUMMARY AND KEY THEMES		INTRODUCTION TO REEF			THE PROCESS AND TIMELINE		KEY SOLUTIONS PROPOSED			WHAT WE NEED FROM YOU	
Ease of doing business	Attracting new business and investment	Immigration	Hospital and healthcare	Grand Bahama International Airport	Maritime and logistics	Tourism	Real estate and urban renewal	Small business sustainability	Resilience & emergency preparedness	Education and training	Agriculture

Maritime and logistics subcommittee

Key solutions proposed (medium/long term)

1. Endeavour to attract ship management companies to the Island.
2. Relocate the Bahamas Maritime Authority (BMA) to Freeport. (This would demonstrate serious intent from the Government to support becoming the “Maritime Centre for the Bahamas”.)
3. Opportunities for developing existing industries to be followed up:
 - a. Lifeboat / Survival craft repair centre for the region.
 - b. Life raft testing and overhaul centre for the region.
 - c. In water survey and underwater hull cleaning and repair centre for the region.
 - d. Ship waste segregation and environmental sustainability: find an international partner to achieve this and expand beyond maritime to the whole Island.
 - e. LNG re-fuelling as ships move to cleaner fuels.
 - a. Working with Environmental legislators on the ability to paint ships while in Harbour.
3. Develop a maritime museum and research centre. This could encompass tourism / education and need not be limited to the Bahamas but encompass the Americas.
4. Create multi-sector, collaborative strategy to promote and attract investors to Freeport and the Maritime Center of the Americas.

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Tourism subcommittee

Key issues identified

- The cruise industry has been significantly affected by Covid 19 and the Center for Disease Control (CDC) is unlikely to permit cruises before October 2020. When cruise lines recommence schedules to Grand Bahama, the 'ramp up' will likely be slow.
- Covid 19 has caused many to be fearful of staying at larger hotel properties. Demand might exist for a private or exclusive living experience when they travel to Grand Bahama, especially while the pandemic persists.
- The cost to travel to Grand Bahama Island is too high compared to other nearby destinations.
- In today's 'new normal' Covid 19 climate, tourists might feel more comfortable traveling around the island in their own vehicles.
- Covid 19 has further exposed the need for us to offer different tourism related products and services. This form of tourism is also almost recession proof.
- Lack of distinctive branding. The name "Freeport" might be confused, for instance, with "Freeport" in California, Florida, Kansas, Texas, Ohio, Michigan, Minnesota, New York, and Pennsylvania.
- Grand Bahama does not have a functioning marina where boats can dock next to proper accommodations, and the boaters can easily walk to an entertainment and shopping zone.

Key solutions proposed (short-term)

1. Offer limited "Companion Sail Free" deals from the Ft. Lauderdale and West Palm Beach gateways to stimulate bookings from Florida. (This would require partnership with the hotels, Balearia Express and Bahamas Paradise Cruise Line, Ministry of Tourism and the Promotion Board respectively.)
2. Seek to attract developers to Grand Bahama who could develop beachfront hotels capitalising on the "private island" concept.
3. Continue to explore options to lower the cost of air travel to Freeport.
4. Explore the feasibility of a first-rate medical tourism offering.
5. Negotiate with the U.S. State Department to revisit the 'drive to Grand Bahama' option, which enabled the temporary importation of vehicles accompanied by visitors travelling via Cruise and Fast ferries from South Florida.
6. Request Government to lobby the U.S. State Department to reconsider their travel advisory warning of crime on Grand Bahama.
7. For tourism purposes, promote GBI as 'Grand Bahama' instead of the confusing Freeport name. There is only one unique spot in the world named Grand Bahama. The name itself brings about a feeling of sophistication.
8. Take advantage of the over 35 beautiful beaches that we have on Grand Bahama, and combine this with more iconic annual events during the year (such as fishing tournaments, golf tournaments, junkanoo experiences, food festivals, sports events eg. Cricket tournaments, Boat racing, Jet Ski racing, Dragon boat racing.) This combination will allow us to be branded as "The Sun and Fun" destination.
9. Resolve the Port Lucaya Marina and Grand Lucayan issues as quickly as possible..

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Real estate and urban renewal subcommittee

Key issues identified

- Freeport's poor general appearance (e.g. derelict buildings.)
- Lack of demand as a residence destination.
- Immigration restrictions have reduced demand for housing (whether to rent or purchase.)
- Uncertainty regarding property taxes.
- Availability of land parcels for development.
- Restoration of hurricane damaged properties.
- Under-utilization / under-appreciation of natural assets.
- Resilience (susceptibility to hurricanes / storm surges.)
- Poor market confidence while major projects (e.g. related to the cruise industry) remain uncertain.

Key solutions proposed (short-term)

1. Pass the Freeport (Environmental) 2007 by-laws (pollution, natural resources, environmental management, and nuisances.)
2. Pass Freeport (Building and Sanitary) by-law amendment (to allow the GBPA to demolish derelict structures and recoup costs from owners, or the land becomes the property of GBPA.)
3. Obtain government approval for the VAT on service charges being currently due on billing, to be paid on receipt. (Many Lucaya Service Co. / GBPA customer base are currently behind in payments.)
4. Review and amend restrictive covenants (subject to 51% approval of residents in each subdivision) that prohibit short term vacation rentals e.g. AirBnB/Vacation Rental Booking Platform.
5. Stimulate demand by targeting specific sectors through the establishment of micro SEZs (see 'Attract new business'.)
6. Establish a 'Sustainability Hub' to target modern, forward looking buyers / schemes / communities.
7. Better incentives for businesses setting up green-related operations.
8. Guarantee advance approval or denial within 30 days. (Investors want to know in advance if they will be approved.)
9. Establish a mechanism for the deferral of payment of VAT to Government by developers, to assist in bridging period between purchase of supplies to sale of property.
10. Incentivised pricing and terms on large sites.
11. Clarify GBDevco's inventory of undeveloped land in SE Lucaya (perception is that it is not available for purchase or development.)
12. Clarify position on pricing for large development parcels in Freeport.
13. Conjoined campaigns to raise funding from international community.
14. Formalise data share between DRA and non-DRA programmes to merge assessed need.

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Real estate and urban renewal subcommittee

Key solutions proposed (medium/long term)

1. Enhance GB's existing boating assets and improve consistency with current customer base by developing piers and docks at all East GB settlements. Launch PPP called Partnership in Economic Recovery (PIER) to develop this programme.
2. Lower minimum investment with residency in a timely manner to \$250,000 and less for Digital Nomads (Consider comparative offerings for PR in other jurisdictions e.g. Malta \$330,000, Portugal \$250,000, Antigua \$100,000, St. Kitts \$150,000, St. Lucia \$100,000.)
3. Expedite immigration procedures and consider use of technology.
4. Create task force to establish competitive FTZ (SEZ) immigration offering.
5. Create an objective and transparent process for Permanent Residency approvals, offered in a competitive framework.
6. Modify VAT payment terms for large property developers on GBI (consider for Abaco as well as part of a post-Dorian Stimulus Initiative.)
7. Host a forum for a Master Planning Symposium that brings together a group of architects, urban planners, financial analysts, entrepreneurs, developers, educators, economists, sociologists to determine the elements that need to be reviewed in the continued growth of Freeport and GB and update the Master Plan Document for the Port Area that sets out short and long term targets.
8. Protect coral reefs with a Reef Restoration programme coordinated by the new Natural Resource Management plan. This programme can be used to engage the international market and stimulate publicity, create jobs (eg: reef rangers, mangrove wardens.)
9. Prioritise the 5-10 GB beaches most cited for their beauty for immediate landscaping and clearance of debris, dead wood, litter, and obstacles. (Contract awards to be prioritized for SMEs.)
10. Explore feasibility of surge barrier system (see 'Resilience and emergency preparedness.)

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Real estate and urban renewal subcommittee

Key solutions proposed (medium/long term) con't

11. Develop appropriate legislation, language in lease/license agreements or the establishment of performance bonds, for all major commercial/industrial projects of a certain size by major investors that speaks to the decommissioning of facilities, abandonment, and/or neglect – that allows the Port Authority or Government to do compulsory acquisition if necessary or repairs at the Developer’s expense.
12. Establish major green spaces in the city that help to re-establish Freeport as a Garden City, along with walking and bicycle paths to support a healthy quality of life.
13. Secure a percentage of the National Environmental tax to assist with the financial obligations to address indiscriminate dumping, demolition, proper disposal of tires, vehicles, batteries, fluids etc.
14. Special Incentives for Permanent Residency in GBI to encourage investment.
15. Consider economic citizenship programme.
16. Pass necessary legislation to clarify long term Real Property Tax position.
17. Establish key memorable, city defining locations: roundabouts, museums and places of interest around the city – that could receive notoriety and attention.
18. Promote the concept of sustainable green living throughout the city and work with the Government to incentivize such practices.
19. Create mechanism to review policies, on an ongoing basis, of competing Free Trade Zone jurisdictions and update GoB policy concurrently.
20. Create a PPP to establish a Marine Protected Area from Peterson’s Cay to Silver Sands Channel, consider leveraging Commonwealth Blue Charter initiative.
21. GoB and GBPA to form PPP to develop a new higher lying subdivision to assist in the relocation of residents away from high risk areas.



Small business sustainability subcommittee

Key issues identified

- Market Saturation in key business categories.
- Lack of critical mass in the Freeport market (hence shortage of customers.)
- Need for funding programs to support micro and small businesses.
- Increased opportunities for cross border trade.

Key solutions proposed (short-term)

1. Develop a program that tracks the number of existing businesses operating in saturated categories and set a realistic threshold for managing oversaturation. This approach would also yield valuable data that GBPA could use to guide new applicants on what business types are needed, best sectors for investment, and what locations may be most profitable for certain types of businesses, etc.
2. Introduce a moratorium period of 12-24 months on business licenses for products/services in saturated markets, especially for locations that already have multiple companies in the sector.
3. Lead a marketing initiative that promotes the benefits of having an online presence for attracting new customers (national, and international.)
4. Lead training initiatives that encourage and support online engagement via training webinars—on basic website development, adding payment gateways, book appointments, etc. and use of social media as a useful marketing tool for increasing brand awareness and attracting new customers.
5. Lead the development of a database for all licensees, connecting users with products/services offered by Freeport/GBI businesses. The database should include necessary details on each company, such as a profile of service, products, location, link to website, contact details, and any other pertinent information. (The 'My GB' app and gbpa.com licensee database could serve as the perfect launchpad for this project.)
6. Lead the development of an actual “virtual” Business License, allowing applicants to utilize their online domain as their virtual location for specific business categories.



Small business sustainability subcommittee

Key solutions proposed (medium/long term)

1. Lead the creation of a partnership funding program that provides access to capital in the form of grants and loans to fund startups and business expansions for Grand Bahama companies. (This can be achieved through an already established program known as the capital arena initiative. The program only requires funding support from corporate stakeholders.)
2. Lead the organization of a business mentoring program that focuses primarily on Financial Management and Business Strategy, to support micro and small businesses with proper planning and management of financial resources.
3. Lead the creation of a GB trade commission whose sole focus is to identify and connect opportunities for cross border trade of products created or manufactured in Grand Bahama, beginning with the national market.
4. Work with relevant agencies to create policies that secure the use (min. % quotas) of locally produced items, which meet industry best standards, before companies and businesses resort to importing the same or similar products for use or sale.
5. Work with Government and relevant agencies to develop and enforce Good Manufacturing Practices/international protocols required for trade with other countries, which all manufacturers could follow and implement to meet global standards (food and beverage, cosmetics related, produce and farming related, etc.) This effort can also be led by GB's trade commission.
6. Encourage building owners to maintain a balanced grouping of businesses, and to avoid multiple competing stores at their location, where possible. This could be done through discounted service charges, etc.
7. Reintroduce GBPA's business diversity waiver program to help stimulate investment in diverse small businesses.
8. Work with Government to develop an aggressive marketing campaign to promote the BH1B Visa program to attract investment within key categories that support the Government's GB Tech Hub and GBPA Smart City Initiatives and tech-related manufacturing or value addition. This can help to physically address the issue of lack of critical mass.
9. Lead the development of a Disaster preparedness training program for micro and small businesses, with a particular emphasis on digital/cloud-based systems to prepare for, and support recovery activities post crisis.
10. Lead the creation of a group insurance fund that could secure a minimum of 10K in disaster coverage (businesses can purchase more if they choose) for micro and small business owners at an affordable cost.



Resilience and emergency preparedness subcommittee

Key issues identified

- On average, Grand Bahama island is impacted by a hurricane every 4 years. More recently, the resulting impact of hurricanes has increased, the most recent being Dorian (Sept 1-3, 2020) which was a category 5 event, with an accompanying 20 ft+ storm surge, which caused catastrophic flood damage in East Grand Bahama and the Freeport area, the likes of which have not been seen in recent memory. However, reviewing historical data it appears that this was not uncommon for this island, prior to its development in the 1950's.
- Without effective storm-surge protection, SEZs and other major new investments will likely be very difficult to attract. However, such storm protection is likely to be too expensive to fund out of existing revenue streams.

Key solutions proposed (short-term)

1. Conduct an initial pre-feasibility assessment to determine the viability and implications of an urban storm-surge protection system for Freeport.
2. Formalize relationships for support, resource and information sharing between Freeport Industrial Group (FIG) and other key industries and stakeholders on GBI.
3. Develop, formalize and publish inventory and resource-sharing agreements domestically and regionally between essential service providers and industrials.
4. Allocate secure high ground for storage of critical infrastructure assets for essential services (as a minimum, vehicles, heavy moving equipment etc.) for all key entities. Independence Park etc.
5. Formalize synergies and communications with local private pilots, boat/ship operators, heavy equipment operators, generator technicians, mechanical and electrical technicians etc.
6. Execute an annual hurricane/flood response drill, and protocols, with key stakeholders including FIG so actions are second nature. Engage an independent organization to audit and review annually prior to hurricane season.
7. Key Stakeholders (FIG, GBPA, Chamber of Commerce) to understand the roles and required interactions of NEMA, GoCB and DRA for the 2020 and 2021 hurricane season. Roles and responsibilities clarification required and published.
8. Formalize and contract commercial support from non-Bahamian entities for emergency services such as freight, food, water, recovery services and search/rescue. (Bahamian NGO's may not always be available, as they were after Dorian).



Resilience and emergency preparedness subcommittee

Key solutions proposed (medium/long term)

1. If initial feasibility assessment for storm-surge protection system yields positive results, proceed to detailed feasibility assessment, cost-benefit analysis and explore funding options. If possible, construct the system.
2. Create, train and equip a volunteer and/or commercial unit for flood search and rescue, with pre-arranged and funded small watercraft. Work with authorities on a young persons' swimming program.
3. Develop and expand access to free first aid training/hurricane and flood survival training for all persons in Grand Bahama.
4. Incorporate and enforce hurricane and flood resilience in building codes. Review building codes to amend and improve areas where necessary to adjust to the frequency and strength of recent storms. Should there be "you cannot rebuild here" zones?
5. Hurricane shelter capacity evaluation. If total island evacuation is required, then we need a published plan with the required and arranged means (cruise ships, airlift etc.) and communicate to stakeholders and the public, and carry out drills. This also needs to be rethought in the new COVID world.
6. Work with and audit commercial banks, financial services and insurance providers to ensure that they improve their local resilience and recovery ability. Make it part of their licensing conditions.
7. Create and test a digital platform for residents to check in and confirm safety, or summon help, leveraging GBPA GIS systems. App to be launched. This could be expanded to cover damage assessment and reporting.
8. Ensure Grand Bahama GIS systems are updated with real addresses, and that people know what their civic address is.
9. Continuous and accessible contractor training on building codes and standards, and meaningful penalties for non-compliance.
10. Food security, sourcing domestic and international food and water supply; supply chain security in ports, alternate ports, handling equipment, and target supply. Longer-term, develop and establish local food supply chain.
11. Carry out a feasibility study on the use of water towers for storage and distribution of potable water.
12. Consider a disaster preparation levy of \$5 on all international airport and seaport arrivals to be used to fund GBI preparedness measures and mitigations; also a tourist bed tax of \$2 dollars per night to add to this fund.

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Resilience and emergency preparedness subcommittee

Key solutions proposed (medium/long term) con't

13. Access the Grand Bahama share of National Environmental Tax proceeds and apply to environmental resiliency measures and projects.
14. Leverage Green Climate Fund (GCF) investment potential for resiliency projects such as renewable energy and storage, mangrove restoration and protection and coral reef barrier enhancement.
15. Establish Freeport as a centre of excellence and test hub for pioneering resiliency measures and techniques, with funding from NGOs, supranational orgs, and impact investors (such as the Green Climate Fund). A significant tranche of external funding could be available for activities such as this.
16. Invest in and improve local education standards – focused education of school children in IT, cloud computing, climate change mitigation etc.
17. Designated alternative airlift and arrival options to GBIA. Importance of protection of terminal building against flooding and runway against flooding damage. Develop contingency plans at West End and Deep Water Cay airports, and possibly the Missile Base (longer term.)
18. Designated alternative seaport options: Consider the impact of channel breach, berth damage and pollution rendering the harbour inoperable.
19. Implement a formal and transparent “Residency by Investment” programme and allocate some of those proceeds towards climate resiliency measures.

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Education and training subcommittee

Key issues identified

- Freeport does not have enough people with the skills that would be required if the economy returns to growth. While some talent could be sourced from elsewhere in the country, many Bahamians would be able to take up employment positions and exploit opportunities to establish their own businesses, if only they had the skills.
- Previous socio-economic assessment research suggested that >133,000 new jobs could be created, in a Freeport developed to its potential.
- Many of those jobs would be in new businesses required to service the greater needs of a larger Freeport, in areas of the economy reserved for Bahamians.
- Lifelong learning and skills development is most effective when instilled from a young age, so Freeport's schools also require attention, if they are to produce new generations that can fully exploit opportunities that will be available.

Key solutions proposed (short-term)

1. Engage industry in defining what training is required and use industry facilities, equipment and personnel to support training.
2. Conduct assessment of technology being used in schools and develop partnerships with private enterprise to upgrade where necessary.
3. Create an immigration policy that supports Freeport's aspiration to 'The Maritime Centre of the Americas' and raise public awareness of the contribution that expatriate-owned businesses and expatriate workers make to the local economy.
4. Implement a programme to raise competencies of teachers through enhanced continuing professional development (CPD) and better equipment.
5. Institute entrepreneurial and business management skills training to prepare Bahamian investor-entrepreneurs for businesses for which economic growth will trigger demand.
6. Focus technical training for The Bahamas in Grand Bahama. One good technical college for the country rather than splitting between Nassau and GBI.

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Agriculture subcommittee

Key issues identified

- Over-reliance on imported food.
- Need for self sufficiency and sustainability.
- Capitalisation on new technologies and methods.
- Environmental resiliency and use of alternate energy sources.
- PPP with financial service provider to support funding.
- Advocacy for marijuana cultivation, production and export.

Key solutions proposed (short-term)

1. Identify sources of accessible and affordable finance mechanisms to develop agriculture projects and fund opportunities to empower local farmers.
2. Educate farmers on the demand for specific items that can be grown locally at scale.
3. Research new models for climate resilient agriculture production in the proposed Coastal Resilience Action Lab / Agri-Park.
4. Research and introduce farmers to new techniques for smart farming. Start hosting farming clinics e.g. through IGBSBB/BAIC.
5. Work with BTVI to introduce farming training.
6. Develop an aquaculture and maricultural development park to allow new aquaculture technologies to be commercialized at scale.
7. Retrieve Aquaculture analysis done for GoB by Dr David Vaughn (Mote Marine Lab) in early 1990s.
8. Create a legislative and regulatory environment to encourage cutting-edge technologies in Freeport.
9. Provide affordable farmland for use through DEVCO and FCI to qualified farming applicants.
10. Press government to share tabled document (Commission Report on the cultivation of marijuana in The Bahamas) and explore potential of medicinal marijuana further.

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Please let us have feedback

- We need you to lend your voice, thoughts and ideas to help shape the future of Freeport and chart a bold new way forward for our city.
- Please complete the survey by visiting reef.gbpa.com and/or provide other written input to info@gbpa.com.
- Everyone with an interest in Freeport and its people are welcome to participate.
- Every idea, comment, and feedback is valuable and will be considered.
- We do not expect everyone to agree.
- We expect new and different points of view to be shared.

Help us fine-tune Freeport
to fit your needs

To make Freeport

- a prosperous, pleasant place to live and work, for all the city's residents
- safe from storm surges and sea-level rise
- less dependent on tourism (without neglecting tourism):



What solutions / actions proposed by the REEF Committee would have the most positive impact?

Which solutions / actions do you believe should be prioritised?

What would need to happen or change, to make them possible?

What should NOT change in Freeport, as it grows?

What changes would you support to laws, regulations and policies (including immigration) to achieve the above three goals?

What solutions would have a significant positive impact, that we have missed?