

Strong Foundations for Sustainable Growth

A socio-economic development strategy for Saba, guiding policies, investments and projects

Final report

28-1-2026

Valerie Vossen, Joris Nanne, and Koert van Buiren



Ministerie van Binnenlandse Zaken en
Koninkrijksrelaties



Ministerie van Economische Zaken



Amsterdam
Bureau for
Economics

research | consultancy | interim-management

Strong Foundations for Sustainable Growth

A socio-economic development strategy for Saba, guiding policies, investments, and projects

Final report

Authors: Valerie Vossen, Joris Nanne, and Koert van Buiren

Amsterdam, Economic Bureau Amsterdam, January 2026

Herengracht 514, 1017 CC Amsterdam

Copyright © 2026 Economisch Bureau Amsterdam EBA B.V. All rights reserved.

Use of data from this report is permitted provided that the source is clearly and accurately cited. Data from this report may not be used for commercial purposes without prior permission from Economisch Bureau Amsterdam EBA B.V.

Commissioned by:



Ministerie van Binnenlandse Zaken en
Koninkrijksrelaties



Ministerie van Economische Zaken

Economic Bureau Amsterdam takes an integrated approach: thorough economic analyses, targeted solutions, and effective implementation. Economic Bureau Amsterdam supports organizations in making and implementing decisions through research, consultancy, and interim assignments.

Economic Bureau Amsterdam strives to be a responsible company that contributes to society. We do this by sponsoring social and community initiatives, offsetting CO₂ emissions, and sharing knowledge and information. See our data tools [Caribbean Analytics and Statistics](#) and [Zoninzicht](#).

Table of Contents

Summary	4
Samenvatting (Nederlands)	10
1. Introduction.....	16
2. Context and baseline situation	18
3. Vision, principles, and objectives	24
4. Strategic priorities and policy directions	27
5. Implementation and governance	43
Appendix A. Full baseline analysis	49
Appendix B. List of measures	70
Appendix C. References.....	75

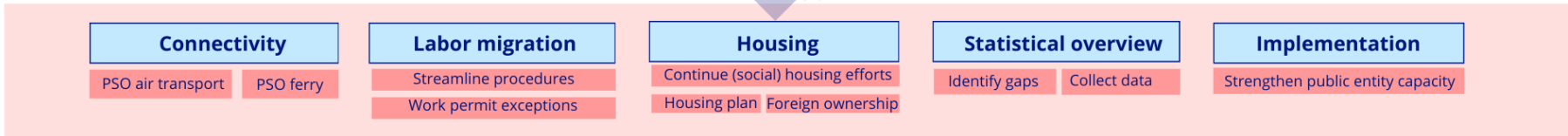
Summary



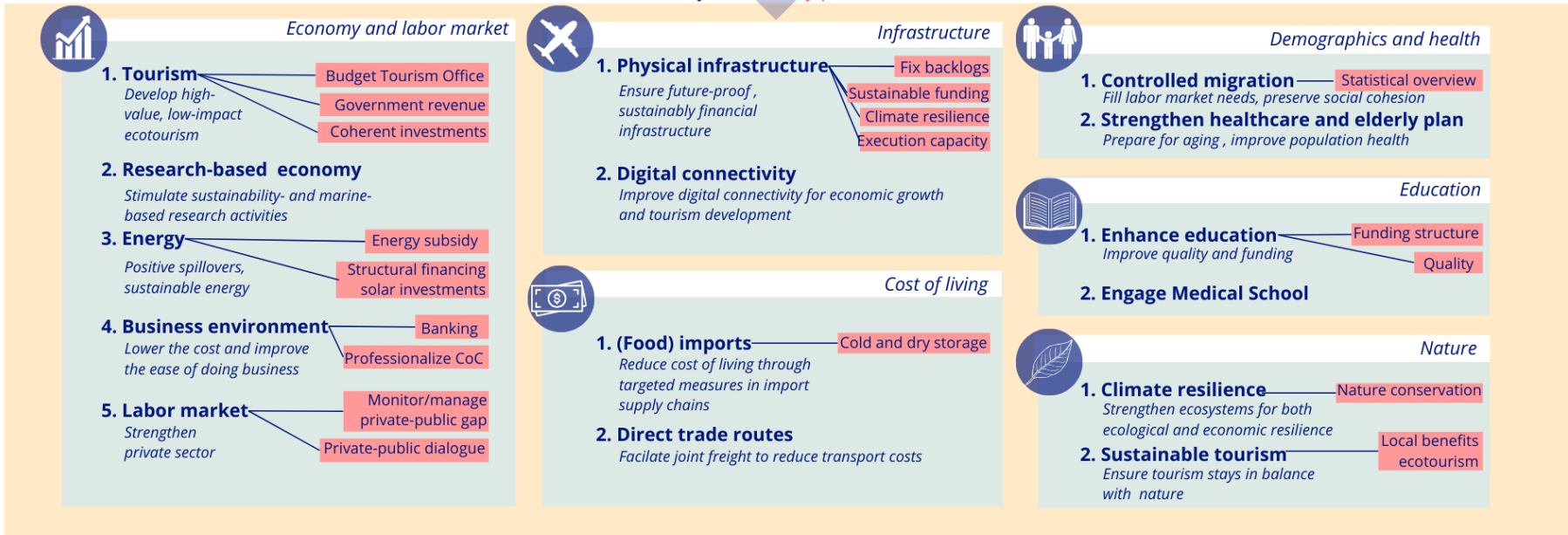
Vision

Achieving sustainable and inclusive welfare growth by strengthening self-reliance, protecting Saba's natural and cultural heritage, enhancing living conditions and the business environment, and building resilience against long-term challenges.

Pre-conditions & key priorities



Objectives & key priorities



Summary

This strategy aims to achieve controlled and sustainable welfare growth, while protecting Saba's natural and cultural assets, improving residents' quality of life and the business environment, and building resilience to long-term challenges. Based on the overarching vision, a set of pre-conditions, objectives, and policies has been defined. The policies are closely interconnected; progress in one area reinforces others, and together they drive social and economic development. The strategy recognizes that Saba's potential for private sector expansion is limited, although these opportunities should be actively pursued. It is important to be realistic and acknowledge that the inherent constraints of Saba as a small island with its geographical complexities will remain, limiting the scope for significantly reducing reliance on the public sector and imports.

Pre-conditions are essential measures required to achieve sustainable welfare growth across all policy domains

Some pre-conditions must be in place to successfully implement the strategy. If these are not in place, it will be difficult to implement other measures and to achieve the overall vision. For example, the absence of an air PSO will cause business costs to remain high and the lengthy labor migration process hinder overall economic growth.

1. **Connectivity:** Reliable and affordable transport is vital to social and economic development. Public service obligations for air and ferry transport are urgent priority measures for the central government.
2. **Labor migration:** The lengthy labor migration process limits the necessary workforce. Assessing how to streamline and fasten the procedures and maintaining an updated list of work permit exceptions are necessary measures. Central government, local government, and the IND should be jointly involved.
3. **Housing:** The shortage of affordable housing presents challenges for both residents and incoming workers. It is recommended to continue and expand current (social) housing initiatives, create a coherent long-term housing

vision (as planned for 2026) which will also have to include elderly housing and should integrate the upcoming Spatial Development Plan. Furthermore, it is recommended to regulate foreign property purchases. Responsibilities are shared between central and local government.

4. **Statistical overview:** Comprehensive, up-to-date data is required to enable effective, data-driven policymaking across different policy areas. This requires identifying data gaps and establishing consistent data collection. Updated and more detailed data are particularly needed for tourism (e.g. to track visitor numbers and spending), the labor market (e.g. to identify key shortages), sector turnover, (future) housing needs, and trade routes.
5. **Implementation capacity:** Sufficient implementation capacity and executive power within the public entity are essential to achieving the goals of this strategy.

Economic policy directions aim to diversify the economy, by developing tourism and research, improving energy affordability and sustainability and the business environment, and managing labor market distortions

To create gradual sustainable growth, policy directions focus on diversifying the economy within realistic boundaries.

- **Tourism:** Ecotourism presents strong opportunities for local benefits, while preserving nature and heritage assets. Priority actions include strengthening the tourism office, enhancing government revenues, and creating coherent investment planning that aligns island developments with the overall vision. Additional measures include promoting cultural heritage and expanding yachting tourism. Most responsibilities fall under the local government.
- **Research-based opportunities:** Saba's maritime and natural ecosystems offer potential for expanding current research activities. This diversifies revenues, builds local knowledge, and supports conservation.
- **Energy affordability and sustainability:** Continued energy subsidies will help reduce household and business costs while generating wider economic

benefits. Assurance of subsidies on renewable investment is required to prevent future funding gaps and increases in energy tariffs. These measures mainly fall under central government responsibility, in collaboration with SEC.

- **Business environment improvements:** Private-sector growth requires addressing bottlenecks in doing business. Key measures include finding a structural solution for banking access, professionalizing the Chamber of Commerce, and improving postal services. Responsibilities lie mostly with the central government. Also, professionalizing the Chamber of Commerce will help to improve business support and representation.
- **Labor market distortions:** Growing competition between the public and private sectors for labor requires active management. Priority measures include monitoring and managing wage gaps and establishing a structured dialogue for better coordination. Further actions to strengthen the private sector are including local contractors in government projects and expanding skill development through training opportunities.

Infrastructure must be future-proof, sustainably funded, and resilient to support economic development

Increased economic activity and climate change place additional pressure on Saba's infrastructure, making it essential to establish a strong foundation for the future.

- **Physical infrastructure:** Addressing backlogs and increasing executing capacity to ensure timely implementation of projects is an urgent priority. Additional measures of high importance include establishing a sustainable investment facility and integrating climate resilience into all investments.
- **Digital connectivity:** Improving digital connectivity, building on recent fibre-optic investments, will support economic development. Satel is also recommended to explore the feasibility of collaboration with telecom suppliers from the Netherlands or other countries to achieve greater scale and efficiency.

Targeted measures are needed to improve supply chain efficiency and control the cost of living, with storage facilities as the most direct way to make an impact

To reduce living costs, several measures, such as affordable transport and housing, and energy subsidies, have already been proposed. This section complements those with targeted actions within government control, focusing primarily on imports.

- **Improving import efficiency:** The most direct way to improve food security and reduce retail prices is establishing a storage facility, including cold storage, at Fort Bay Harbor. This falls under local government responsibility. Other measures that can be explored include removing ABB on transport, which will, however, have limited impact, and enabling cargo on the ferry from Sint Maarten, mostly within central government responsibility. Retailers can also contribute by selling off-brand products and applying lower margins on basic goods.
- **Consolidated freight and direct trade routes:** Establishing direct trade routes can improve supply chain efficiency, enhance resilience, and reduce transport costs, although challenges remain in implementation. Proposed measures include government-initiated joint imports, collaboration with Sint Eustatius on direct trade routes, and engagement of the Chamber of Commerce for long-term coordination among importers.

Targeted labor migration and high-quality health services are essential to maintain demographic balance and prepare for an aging population

With an aging population, it is crucial to ensure sufficient workforce inflow while also preserving Saba's strong social cohesion. Moreover, rising healthcare demand requires a coherent set of measures that strengthen elderly support and expand preventive care.

- **Targeted and controlled migration:** In addition to improving the lengthy labor migration process, developing a statistical overview of the labor market helps identify shortages and guide migration policy. Migration should be accompanied by an integration policy to maintain the strong social cohesion.

Summary

- **Improved health- and elderly care:** To ensure good living conditions for the elderly and accommodate growing demand for healthcare services and adequate housing, a coherent elderly plan is essential. This plan must include collaboration between stakeholders and anticipate future demographic developments. Furthermore, especially in the light of the aging population, a shift to preventive care and public health is important, and strengthening regional cooperation in healthcare can help overcome some limitations of Saba's small scale.

Well-funded and high-quality education is central to the island's development

Education plays a central role in children's development and creating a stable environment that attracts families to settle or return to Saba. Furthermore, the Saba Medical School contributes to economic activity on the island.

- **Well-funded, high-quality schools:** Challenges in quality and funding of the schools must continue to be addressed. Ensuring sufficient funding that accounts for all factors affecting education costs is a high-priority measure under central government responsibility. Improving overall school quality requires collaboration with the school boards.
- **Engage the Medical School:** The Medical School is facing declining student numbers. Maintaining active collaboration between the school and the local government ensures coordinated action to solve bottlenecks within control.

Strong ecosystems and sustainable tourism are key to resilience and long-term economic benefits

Conserving Saba's ecosystems supports both ecological resilience and economic functions.

- **Climate resilience:** Nature conservation is a high-priority responsibility of the local government, ensuring ecosystems are in a strong state. Furthermore, while Saba remains dependent on imported food, self-sufficiency and food security can be improved through measures proposed in the (draft)

Climate Plan, such as expanding Hell's Gate Farm, upgrading the butcher station, introducing mushroom farming, and creating a market for farmers.

- **Sustainable ecotourism:** Tourism development must be inherently linked with environmental protection and ensure local benefits are generated from natural assets, both now and for future generations. Additional to the proposed tourist nature fee in the Tourism Masterplan, requiring green investments in tourism-related construction projects helps ensure the overall vision is reinforced in every development. Responsibility for implementation lies primarily with the local government.

Effective implementation depends on execution of the strategy as a whole, with clear prioritization, public engagement, sufficient funding, and clear collaboration

Effective implementation depends on execution of the full program, clear prioritization, continuous stakeholder engagement, sufficient and predictable funding, and a collaboration that defines roles, coordination, and accountability. A thematic implementation program is necessary but not sufficient. Successful implementation requires a structured collaboration that clearly specifies, for all organizations and individuals involved, how responsibilities for execution, support, steering, monitoring, reporting, commissioning, escalation, and overall accountability are organized and assigned. Without this, efforts risk becoming fragmented, sub-goals may take precedence over the overarching goal, accountability may be weakened, and the likelihood of successful implementation will be reduced.

- **Integrated implementation required:** The strategy should be implemented as an integrated whole rather than as a menu of optional measures. While 'cherry-picking' individual actions, and excluding others, may improve parts of Saba's socio-economic context, the overarching vision will not be achieved. Measures and objectives across policy areas are intertwined. For example, if physical infrastructure priorities are not delivered, tourism and economic growth are undermined due to reduced access, transport of goods, and the weaker resilience to future climate-related damage.

Summary

Similarly, without a PSO, constraints on connectivity and the high cost of living and doing business will hold back growth overall.

- **Bottom-up approach and funding:** Implementation should follow a bottom-up approach, with stakeholders and the wider public informed from the start. Furthermore, sufficient, timely, and structural funding are essential. For the physical domain, a dedicated fund for investments is recommended.
- **Collaboration structure:** To ensure continuity and delivery beyond political cycles, a governance structure with clear mandates is recommended. The suggested structure contains three levels: a joint governance table (local and central government) for steering and accountability, a strategy coordinator for day-to-day oversight and escalation, and a level of thematic execution for monitoring progress as well as delivering policy decisions, investments and projects. Wherever possible, these tasks are integrated within existing working structures to ensure it is as effective as possible Saba's small-scale context. Experts from the private sector and organizations should also participate in this layer.
- **Sufficient capacity, funding, and expertise:** The strategy coordinator will work with the public entity to map the capacity, funding and expertise required to implement the strategy. Execution of the strategy will, as much as possible, be integrated into existing structures and working groups.

Samenvatting (Nederlands)



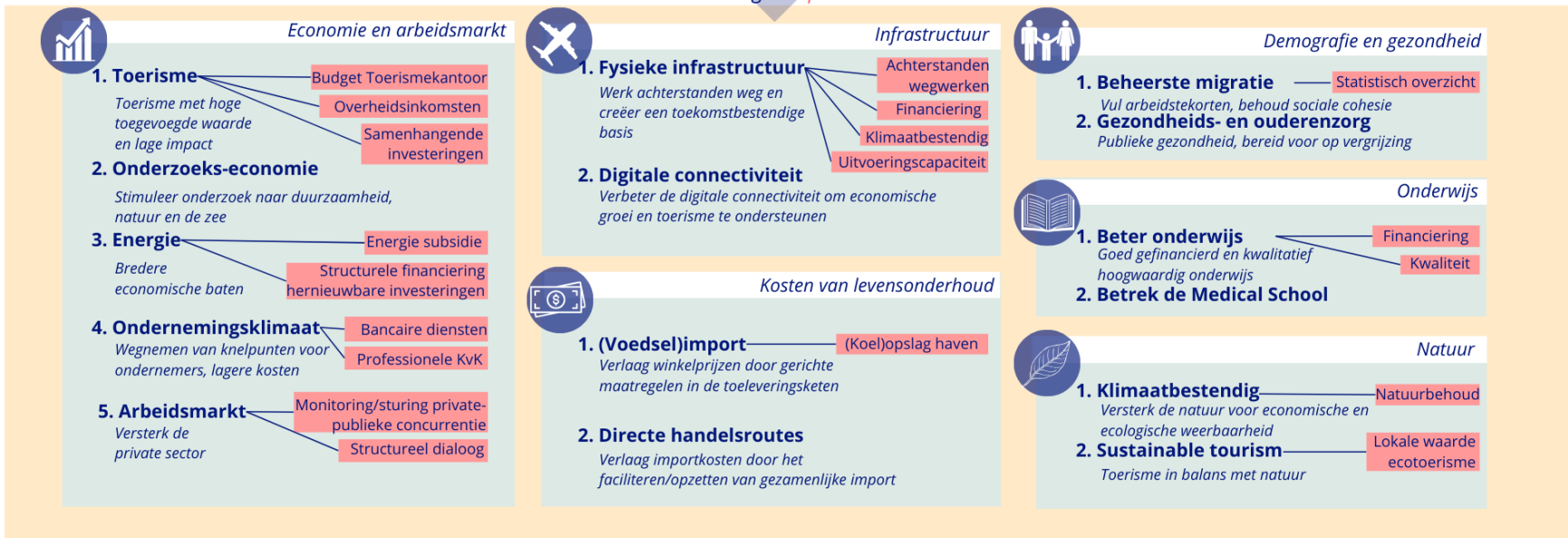
Visie

Duurzame en inclusieve brede welvaartsgroei op Saba door verhoging van de zelfvoorzienendheid, bescherming van natuur en cultureel erfgoed, verbetering van leefomstandigheden en ondernemingsklimaat, en versterking van weerbaarheid tegen langetermijnuitdagingen.

Randvoorwaarden & prioriteiten



Doelstellingen & prioriteiten



Het doel van de strategie is een beheerste en duurzame brede welvaartsgroei voor Saba. Hierbij staan het behoud van de natuur en culturele waarden, een betere kwaliteit van leven voor inwoners, een beter ondernemingsklimaat, en een hogere weerbaarheid tegen uitdagingen in de toekomst centraal. De geformuleerde randvoorwaarden, doelstellingen en beleidsrichtingen vertalen deze visie naar concrete stappen. De beleidsmaatregelen hangen nauw met elkaar samen: vooruitgang op het ene beleidsterrein versterkt andere domeinen. Gezamenlijk dragen ze bij aan duurzame sociale en economische ontwikkeling op Saba.

De strategie erkent dat het groeipotentieel van de private sector op Saba beperkt is, al dienen kansen actief te worden benut. Tegelijkertijd is het belangrijk om te onderkennen dat de structurele beperkingen van Saba als klein eiland, met complexe geografische omstandigheden, blijven bestaan. Daardoor zijn de mogelijkheden om de afhankelijkheid van de publieke sector en van importen substantieel te verminderen beperkt.

Randvoorwaarden op het gebied van connectiviteit, arbeidsmigratie, huisvesting, dataverzameling en uitvoeringskracht zijn essentieel om welvaartsgroei in alle beleidsdomeinen mogelijk te maken

Voor een succesvolle uitvoering van de strategie moeten bepaalde randvoorwaarden worden ingevuld. Als deze niet op orde zijn, zal het moeilijk zijn om de overkoepelende visie te realiseren. Zo zal het ontbreken van een luchtvaart-PSO ertoe leiden dat de kosten van ondernemen op het eiland hoog blijven en zal het langdurige proces van arbeidsmigratie de gehele economische groei belemmeren.

1. **Connectiviteit:** Betrouwbaar en betaalbaar vervoer is cruciaal voor sociaal-economische ontwikkeling. Een openbaredienstverplichting (*public service obligation; PSO*) voor lucht- en veerverbindingen is een urgente prioriteit; de verantwoordelijkheid ligt hierbij voornamelijk bij de Rijksoverheid.
2. **Arbeidsmigratie:** De langdurige procedures voor arbeidsmigratie beperken de economische groei. Saba beschikt over onvoldoende lokale arbeidskrachten, en de huidige procedures vertragen de instroom van benodigde werknemers van buitenaf. Het versnellen van deze procedures en het actueel houden van de lijst met uitzonderingen op tewerkstellingsvergunningen zijn noodzakelijk. Dit vraagt om gezamenlijke inzet van de Rijksoverheid, het lokaal bestuur en de IND.
3. **Huisvesting:** Het tekort aan betaalbare woningen vormt een knelpunt voor zowel inwoners als inkomende werknemers. Aanbevolen wordt om bestaande (sociale) woningbouwinitiatieven voort te zetten en uit te breiden en om een lange termijn-huisvestingsvisie te ontwikkelen (voorzien in 2026), afgestemd op het toekomstige Ruimtelijk Ontwikkelingsplan. Daarbij krijgt ouderenhuisvesting expliciet een plek en wordt aanbevolen de aankoop van vastgoed door buitenlandse kopers te reguleren. De verantwoordelijkheden voor huisvesting liggen zowel bij de lokale als de centrale overheid.
4. **Actuele en betrouwbare data:** Zonder actuele, volledige en betrouwbare data is effectief, datagedreven beleid niet mogelijk. Dit vraagt om inzicht in waar deze ontbreken en om vervolgens om structureel en consistent data te verzamelen. Met name voor toerisme (zoals bezoekersaantallen en bestedingen), de arbeidsmarkt, sectoromzetten, de (toekomstige) woningbehoefte en handelsstromen ontbreken momenteel (actuele) data.
6. **Uitvoeringscapaciteit:** Voldoende uitvoeringscapaciteit, expertise en bestuurlijke slagkracht binnen het openbaar lichaam zijn essentieel om de doelstellingen van deze strategie te realiseren.

Samenvatting (Nederlands)

De economische maatregelen zijn gericht op economische diversificatie, door toerisme- en onderzoeksactiviteit te ontwikkelen, het verbeteren van de betaalbaarheid en duurzaamheid van energie en het ondernemingsklimaat en het beheersen van verstoringen op de arbeidsmarkt

Om duurzame groei te realiseren, wordt ingezet op economische diversificatie binnen realistische grenzen.

- **Toerisme:** Ecotoerisme biedt kansen voor de lokale economie, met behoud van natuur en cultureel erfgoed. Prioriteit ligt bij het versterken van de toerismeorganisatie, het vergroten van overheidsinkomsten uit toerisme en het ontwikkelen van een samenhangende investeringsplanning zodat ruimtelijke ontwikkelingen op het eiland aansluiten bij de visie. Aanvullend draagt het behoud en de promotie van Saba's cultureel erfgoed en de ontwikkeling van jachtoerisme hieraan bij. De belangrijkste taken op het gebied van toerisme liggen bij het lokaal bestuur.
- **Onderzoeks-economie:** Saba's maritieme en natuurlijke ecosystemen bieden de mogelijkheid om bestaande onderzoeksactiviteiten uit te breiden. Dit draagt bij aan diversificatie van inkomsten, versterking van lokale kennis en natuurbehoud.
- **Betaalbare en duurzame energie:** Voortzetting van energiesubsidies verlaagt de kosten voor huishoudens en levert bredere economische voordelen op. Daarnaast is structurele financiering van de investeringen in hernieuwbare energie nodig om toekomstige tekorten en stijgende energietarieven te voorkomen. Deze maatregelen vallen voornamelijk onder de verantwoordelijkheid van de Rijksoverheid, in samenwerking met SEC.
- **Beter ondernemingsklimaat:** Het wegnemen van knelpunten voor ondernemers is essentieel voor de groei van de private sector. Dit betreft onder meer een structureel aanbod van bancaire diensten op het eiland, een professionalisering van de Kamer van Koophandel en verbetering van de postdiensten. Deze taken liggen grotendeels bij de Rijksoverheid

- **Verstoringen op de arbeidsmarkt:** Toenemende concurrentie tussen de publieke en private sector om arbeidskrachten vraagt om actieve monitoring en sturing. Het opzetten van een structurele dialoog draagt bij aan betere afstemming tussen de publieke en private sector. Daarnaast kan de private sector worden versterkt door vaker lokale aannemers te betrekken bij overheidsprojecten en opleidings- en scholingsmogelijkheden uit te breiden.

Toekomstbestendige infrastructuur geldt als fundament voor economische ontwikkeling

Toenemende economische activiteit en klimaatverandering leggen extra druk op de infrastructuur van Saba. Daarom is een toekomstbestendige en veerkrachtige basis noodzakelijk.

- **Fysieke infrastructuur:** Het wegwerken van onderhoudsachterstanden en het vergroten van de uitvoeringscapaciteit zijn urgente prioriteiten. De grote investeringsopgave vraagt om een duurzaam investeringsfonds. Klimaatbestendigheid verdient een vaste plek in alle investeringsbeslissingen, om toekomstige schade en kosten te voorkomen.
- **Digitale infrastructuur:** Verbetering van de digitale connectiviteit, voortbouwend op recente glasvezelinvesteringen, ondersteunt economische groei. Daarnaast kan Satel de haalbaarheid onderzoeken van samenwerking met telecomaانبieders uit Nederland of andere landen om schaalvoordelen en efficiëntie te realiseren.

Gerichte maatregelen voor lagere kosten van levensonderhoud zijn nodig, waarbij een opslagfaciliteit in de haven de meest directe en haalbare maatregel is

Naast al voorgestelde maatregelen zoals betaalbaar vervoer, huisvesting en energiesubsidies, helpen aanvullende gerichte acties om de efficiëntie van de import aanvoer te verbeteren en de kosten van levensonderhoud te beheersen.

Samenvatting (Nederlands)

- **Efficiëntie in import:** Het realiseren van een opslagfaciliteit, inclusief gekoelde opslag, bij Fort Bay Harbor, is de meest directe maatregel om de voedselzekerheid te verbeteren en winkelprijzen te verlagen. Dit valt onder de verantwoordelijkheid van het lokaal bestuur. Andere te verkennen maatregelen zijn het schrappen van ABB op transport (met beperkt effect) en het mogelijk maken van vrachtvervoer per veerboot vanuit Sint Maarten, voornamelijk onder verantwoordelijkheid van de Rijksoverheid. Ook kunnen winkeliers bijdragen door huismerken te verkopen en lagere marges toe te passen op basisproducten.
- **Geconsolideerde vracht en directe handelsroutes:** Het opzetten van directe handelsroutes kan de efficiëntie en weerbaarheid van de toeleveringsketen vergroten en transportkosten verlagen, hoewel de uitvoering complex is. Voorgestelde maatregelen zijn het initiëren van gezamenlijke importen onder regie van de overheid, samenwerking met Sint Eustatius op directe handelsroutes en een coördinerende rol voor de Kamer van Koophandel voor afstemming tussen importeurs.

Gerichte arbeidsmigratie en hoogwaardige gezondheidszorg dragen bij aan een goede voorbereiding op vergrijzing.

Met het oog op een vergrijzende bevolking is het essentieel om voldoende instroom van arbeidskrachten te waarborgen en tegelijkertijd de sterke sociale cohesie van Saba te behouden. Daarnaast vraagt de toenemende zorgvraag om een samenhangend pakket aan maatregelen.

- **Gerichte en beheerste migratie:** Naast het verbeteren van arbeidsmigratieprocedures is een actueel en betrouwbaar overzicht van de arbeidsmarkt nodig om inzichtelijk te maken in welke sectoren de tekorten het grootst zijn. Migratie dient te worden ondersteund door integratiebeleid om de sociale cohesie te behouden.
- **Gezondheids- en ouderenzorg:** Om goede leefomstandigheden voor ouderen te garanderen en in te spelen op de groeiende zorgvraag en

huisvestingsbehoefte, is een samenhangend ouderenbeleid nodig. Dit vereist samenwerking tussen betrokken partijen en een vooruitblik op demografische ontwikkelingen. Daarnaast is, zeker gezien de vergrijzing, een verschuiving naar preventieve zorg en publieke gezondheid belangrijk. Versterkte regionale samenwerking kan bovendien helpen om schaalnadelen te overwinnen.

Hoogwaardig onderwijs speelt een sleutelrol in de ontwikkeling van het eiland

Onderwijs speelt een sleutelrol in de ontwikkeling van kinderen en in het creëren van een stabiele leefomgeving die gezinnen aantrekt om zich op Saba te vestigen of terug te keren. Daarnaast draagt de Saba Medical School bij aan het eiland door het creëren van economische activiteit.

- **Goed gefinancierd en kwalitatief hoogwaardig onderwijs:** Uitdagingen op het gebied van kwaliteit en financiering van scholen vragen blijvende aandacht. Het waarborgen van voldoende financiering is een hoge prioriteit en ligt primair bij de Rijksoverheid. Verbetering van de onderwijskwaliteit vraagt om nauwe samenwerking met de schoolbesturen.
- **Samenwerking met Saba Medical School:** De Saba Medical School kampt met dalende studentenaantallen. Actieve samenwerking tussen de school en het lokaal bestuur is noodzakelijk om knelpunten gezamenlijk en gecoördineerd aan te pakken.

Het behoud van ecosystemen draagt bij aan zowel ecologische veerkracht als economische functies

Sterke ecosystemen en duurzaam toerisme gelden als basis voor Saba's economische en ecologische weerbaarheid.

- **Klimaatbestendige ecosystemen:** Natuurbehoud is een hoge prioriteit voor het lokaal bestuur. Maatregelen uit het Klimaatplan versterken daarnaast de zelfvoorzienendheid en voedselzekerheid van het eiland, ook al blijft Saba

Samenvatting (Nederlands)

afhankelijk van geïmporteerd voedsel. Voorbeelden zijn de uitbreiding van Hell's Gate Farm en verbetering van de slachtfaciliteit.

- **Duurzaam ecotoerisme:** Groei van het toerisme moet onlosmakelijk verbonden blijven met milieubescherming en lokale waarde creëren, nu en in de toekomst. Om de visie te borgen kan, naast de voorgestelde natuurbijdrage voor toeristen in het Toerisme Masterplan, bij nieuwe toerisme ontwikkelingen op het eiland een verplichting worden opgenomen voor groene investeringen. De uitvoering ligt voornamelijk bij het lokaal bestuur.

Succesvolle implementatie vraagt om uitvoering van de strategie als geheel, met heldere samenwerking en actieve betrokkenheid van stakeholders en inwoners

Succesvolle implementatie vraagt om het uitvoeren van de strategie als een geheel, het stellen van prioriteiten, het blijvend betrekken van stakeholders en inwoners, en voldoende en voorspelbare financiering. Ook is een samenwerkingsstructuur nodig die heldere verantwoordelijkheden én duidelijke verantwoording vastlegt. Daarbij moet voor alle betrokkenen duidelijk zijn wie waarvoor aan zet is: uitvoering, ondersteuning, sturing, monitoring, rapportage, escalatie en eindverantwoordelijkheid. Een thematisch uitvoeringsprogramma is noodzakelijk, maar op zichzelf niet voldoende. Ontbreekt een duidelijke uitvoeringsstructuur, dan dreigt versnippering; maatregelen worden selectief opgepakt ('*cherry picking*') en de strategie als geheel verschuift naar de achtergrond.

- **Uitvoering als geheel:** De strategie moet als één geheel worden uitgevoerd, niet als een menu van losse opties. Selectieve uitvoering van individuele maatregelen kan onderdelen verbeteren, maar realiseert de visie niet. De doelen hangen samen: blijven infrastructuurmaatregelen uit, dan schaadt dit toerisme en economische groei door verminderde bereikbaarheid, beperkingen in goederenvervoer en lagere klimaatbestendigheid. Blijven connectiviteitsprioriteiten achter, dan remmen de hoge kosten van levensonderhoud en ondernemen de algehele groei in brede welvaart.

- **Bottom-up benadering en financiering:** De uitvoering volgt een *bottom-up* benadering, waarbij stakeholders en bewoners vanaf het begin in zowel de plannen als de uitvoering worden betrokken. Daarnaast zijn voldoende, tijdige en structurele financiële middelen essentieel. Voor het fysieke domein wordt de oprichting van een investeringsfonds aanbevolen.
- **Samenwerkingsstructuur:** Om continuïteit in uitvoering over politieke cycli heen te waarborgen, wordt een samenwerkingsstructuur met duidelijke verantwoordelijkheden aanbevolen. Deze bestaat uit drie niveaus: een gezamenlijke bestuurlijke tafel (lokaal en centraal) voor sturing en verantwoording, een strategiecoördinator voor dagelijkse regie, en een uitvoeringsniveau, voortbouwend op wat er al staat en waar nodig uitgebreid met extra capaciteit, expertise en financiering.

1. Introduction



Background and rationale

Sustainable economic development is one of the central objectives agreed upon by Bonaire, Sint Eustatius and Saba with the Netherlands in various administrative agreements in the run-up to '10-10-10'. Subsequently, the public entities have, in successive administrative agreements with the Netherlands, made commitments aimed at promoting the socio-economic development. In recent years, the emphasis has shifted toward strengthening the earning capacity and self-reliance on the islands.

Nevertheless, sustainable economic development has remained limited. Real gross domestic product (GDP) per capita, a commonly used measure of welfare, has declined on Saba, as well as on Bonaire and Sint Eustatius. This implies that, corrected for population growth and inflation, the economy contracted. At the same time, poverty reduction policies, particularly in recent years, have had an effect: (relative) poverty has fallen by one to two percentage points on all three islands; income inequality has declined on Saba and Sint Eustatius (while remaining unchanged on Bonaire). Still, 20 to 25 percent of households live in poverty, twice the rate of the European Netherlands.

Small island economies such as Saba rely heavily on the public sector. Dependence on the public sector has increased: the share of the labor force employed in government, education, and healthcare has grown significantly, from 41 percent in 2012 to 53 percent in 2024. The private sector of Saba is currently heavily dependent on individual actors, notably the Saba University School of Medicine.

These developments show that Saba, like Bonaire and Sint Eustatius, hasn't experienced sustainable economic development and that earning capacity appears to have weakened: GDP per capita has fallen and dependence on the public sector has grown.

Against this background, the Dutch government, together with the executive council of Saba, is committed to economic development and strengthening the earning

capacity and self-reliance of Saba. The Ministry of the Interior and Kingdom Relations (BZK) has therefore agreed with Saba to jointly – the public entity, the Ministry of BZK, and the Ministry of Economic Affairs (EZ) – prepare a socio-economic development strategy for the medium and long term.

Objectives and expected results

The development strategy of Saba:

- contributes to structural, sustainable economic development and to strengthening earning capacity and self-reliance.
- is tailored to the specific circumstances, needs, aspirations, and opportunities of Saba.
- is developed in consultation with, and enjoy support from, stakeholders, the public entities, and the national government.
- is realistic, both in terms of objectives (feasibility) and in terms of implementation (practicality).
- provides a clear medium- and long-term framework for the public entity and the national government within which agreements are made, policies are developed, investments are undertaken, and priorities are set.
- contains concrete proposals, actions, and projects that enable effective implementation of the development strategies.

The findings described in this report are based on the review and analysis of relevant reports, policy documents and data, as well as stakeholder engagement. Each chapter includes references to the sources on which the information presented is based.

Chapter 2 summarizes the relevant context and baseline situation. Chapter 3 presents the overall strategy, providing a top-down view to ensure coherence across all actions. Chapter 4 details the pre-conditions and policy directions per policy area, offering concrete short-term guidance while aligning with the long-term vision. Lastly, Chapter 5 discusses implementation and governance.

2. Context and baseline situation



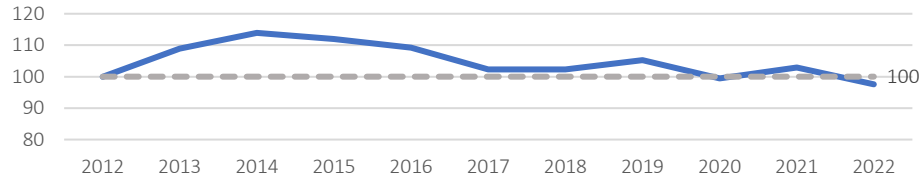
Context and baseline situation

The baseline analysis outlines the current socio-economic situation on Saba and developments over the past 15 years. Appendix A includes the full analysis. The rest of this section summarizes this analysis, focusing on the developments that are most relevant to the strategy. To conclude, a SWOT analysis is presented.

Economic decline accompanied by progress on poverty measures

- **Decline in welfare:** Real GDP per capita decreased by 6 percent between 2012 and 2022, indicating a reduction in average welfare on Saba.

Figure 1: Real GDP per capita in 2022 is slightly lower compared to 2012.



Source: Economic Bureau Amsterdam (2026) based on CBS¹.

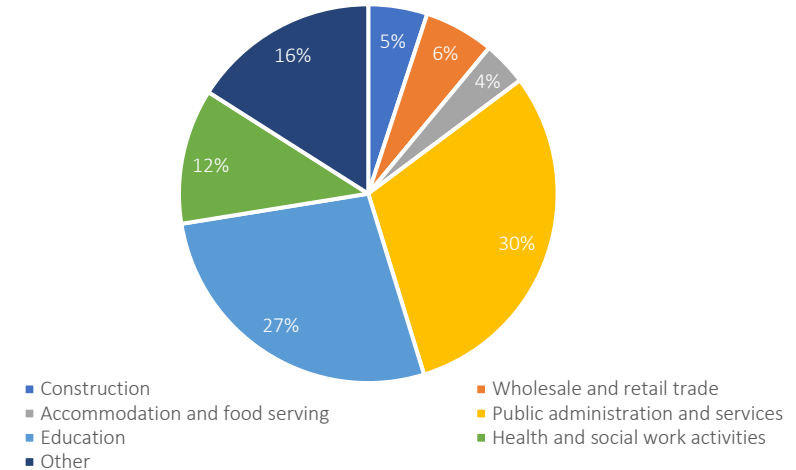
- **Progress on poverty and income inequality:** Poverty conditions on Saba have improved, with the share of households below the social minimum falling from 27 percent in 2018 to 20 percent in 2022. Income inequality has decreased, with a Gini coefficient of 0.35 in 2022, though still higher than the 0.32 observed in the European Netherlands in 2024.²

The economy relies heavily on the public sector, tourism contributes a moderate amount

- **Public administration and education are the largest sectors:** Public administration and services (30 percent) and education (27 percent) account for

the largest share of Saba's economy. In the labor market, 66 percent of the employed labor force worked in the public sector in 2022.

Figure 2: Public administration and services and education make up a big part of the economy.



Source: Economic Bureau Amsterdam (2026) based on CBS³.

- **Tourism contributes less than previously assumed:** In 2023, around 5,700 tourists arrived by plane, 38 percent fewer than in 2012.⁴ This number needs to be considered with caution, as stakeholders have expressed concerns about the reliability of this data. Tourism, estimated to include the sectors culture, recreation and other services and accommodation and food serving, accounts for approximately 7 percent of Saba's economy.⁵ The 24 percent share in the Tourism Masterplan reflects tourism expenditure, not economic output. Furthermore, doubling tourism would only increase output by

¹ CBS StatLine. Caribisch Nederland; bruto binnenlands product (bbp).

² CBS StatLine. Caribisch NL; inkomensongelijkheid bij particuliere huishoudens & CBS StatLine. Ongelijkheid in inkomen en vermogen; huishoudens.

³ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

⁴ CBS StatLine. Caribisch NL: inkomend toerisme per vliegtuig.

⁵ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

Context and baseline situation

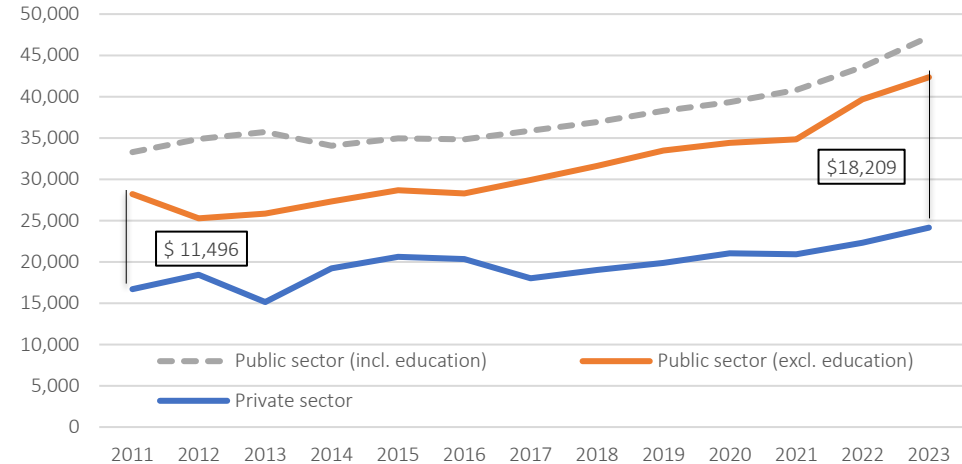
roughly 8 percent.⁶ Key constraints to tourism growth include high business costs, limited accessibility, skilled labor shortages, weak marketing, insufficient data collection, under-monetized nature, and limited range of tourism products.⁷

- **New harbor offers economic benefits and opportunities:** The Black Rocks Harbor project is expected to boost GDP by 17 million dollars and create 103 FTE jobs during construction. Once operational, it is expected to add 401,000 dollars to GDP annually, generate 196,000 dollars in labor income, and support 7 FTE jobs.⁸ The harbor also offers opportunities to expand yachting tourism, while Fort Bay harbor can serve as a cargo harbor, enabling increased trade opportunities through greater cargo capacity. However, Fort Bay harbor will still not be able to accommodate larger vessels, which might continue to limit its capacity after the upgrades.

Improved labor conditions of public sector risk crowding out private sector

- **Crowding out of private sector:** Almost all sectors have seen wage increases between 2011 and 2023, with the steepest growth in public administration and services, reaching 42,020 dollars in 2023. Overall, there is widening wage gap between the public and private sector. The difference between public and private sector increased with 58 percent. Along with differences in secondary labor conditions⁹, this makes it increasingly difficult for private employers to compete for workers.

Figure 3: The gap between private sector and public sector wages has increased with 58 percent.



Source: Economic Bureau Amsterdam based on CBS¹⁰. Public sector excludes education sector, because the private Medical School is included in this data. The wage gap is higher if public sector includes education (grey dashed line). Wages are weighted averages based on the number of jobs per sector.

Migration sustains population growth, but aging poses a long-term challenge

- **Population aging:** Saba's population reached 2,158 in 2025. Recent population growth has been driven mainly by migration, particularly from Latin America. Saba's population is aging. Currently, about one in four working-age residents is aged 65 or older, a share expected to rise depending on future migration, increasing pressure on healthcare, housing, and infrastructure.

⁶ This estimate comes from a growth analysis by EBA and is detailed further in the baseline analysis in Appendix A.

⁷ University of Central Florida (2023).

⁸ Ernst & Young (2024).

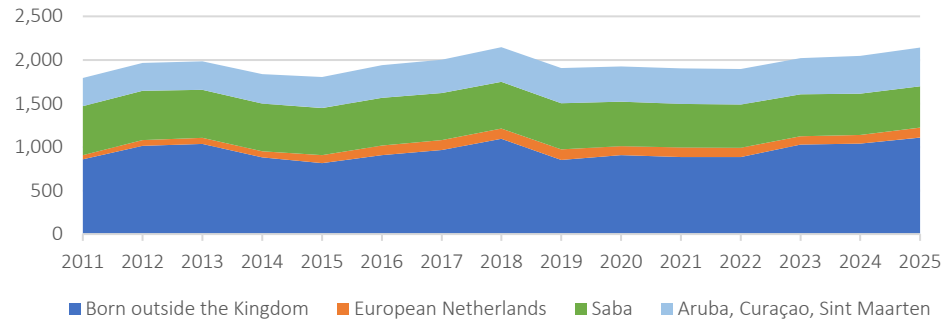
⁹ SEO Economisch Onderzoek & Vrije Universiteit Amsterdam (2025).

¹⁰ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

Context and baseline situation

- **Migration temporarily offsets aging:** Migration can help delay population aging and address labor shortages in Saba's tight labor market (1 percent unemployment in 2024¹¹), providing both workers and needed skills.¹²

Figure 4: A large part of the Saban population originates from outside of the Kingdom of the Netherlands.



Source: Economic Bureau Amsterdam (2026) based on CBS¹³.

Air and sea connectivity is vital for Saba's population and economy

- **Limited connectivity:** Reliable and affordable air and sea transport is crucial for Saba's population and economy. High and rising fares, limited frequency of flights, and the planned end of the ferry subsidy pilot create financial, social, and health-related challenges to residents. The Saba Package Agreement recognizes the importance of addressing connectivity.

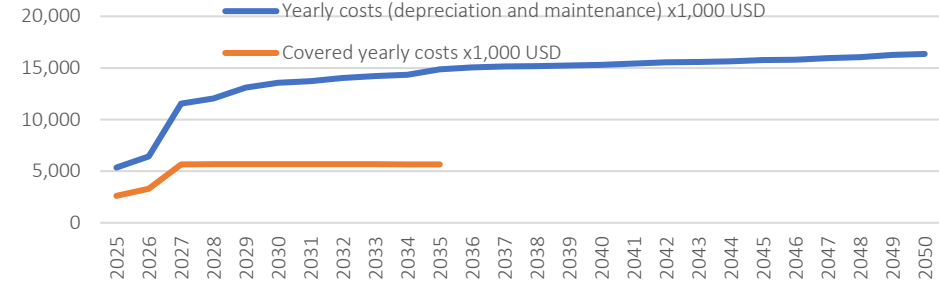
Overdue maintenance drives high investments costs in infrastructure

- **Overdue maintenance:** Some parts of Saba's infrastructure require upgrades or overdue maintenance. Costs are high due to deferred maintenance, the

need for frequent upkeep in the local climate, and higher expenses resulting from importing all the materials. Total maintenance and depreciation cost are estimated at approximately 10 million dollars per year between 2025 and 2050, as reported in the study on the financial challenges of physical infrastructure in the Caribbean Netherlands.¹⁴

- **Part of investments financially uncovered:** Not all required investments are currently budgeted, with an estimated total of 84 million dollars between 2025 and 2050 still uncovered.

Figure 5: Costs of depreciation and maintenance are estimated to rise to over 16 million per year in 2050, of which only a share is covered.¹⁵



Source: Economic Bureau Amsterdam (2026) based on AEF¹⁶.

- **Limited implementation capacity:** Due to the limited capacity of the public body and local contractors, AEF developed a scenario that distributes investments more evenly over time.

The cost of living is high on Saba

- **High cost of living:** Prices on Saba are higher than on Sint Maarten, Sint Eustatius and Bonaire. Between 2010 and 2023, overall prices on Saba rose

¹¹ CBS StatLine. Caribisch Nederland; arbeidsdeelname, kerncijfers.

¹² State Commission Demographic Developments Caribbean Netherlands 2050 (2024).

¹³ CBS StatLine. Caribisch Nederland; bevolking, geboorteland, nationaliteit.

¹⁴ Andersson Elffers Felix (2024).

¹⁵ Covered shares are only displayed until 2035, because the uncovered shares of costs are difficult to estimate, especially in further years.

¹⁶ Andersson Elffers Felix (2024).

Context and baseline situation

by 34.5 percent, with food prices increasing even more sharply by 52.5 percent. Many of the underlying causes are external and difficult to address, such as the island's small scale, mountainous terrain, remoteness from major markets, high wages and limited port capacity.¹⁷

Education has an important role in Saba's economy

- **Saba Medical School is the largest private-sector employer:** The Saba Medical School provides a large share of jobs on the island and helps generate economic activity by attracting international students and professionals. Student numbers have been decreasing in recent years due to lingering post-COVID effects and increased competition from U.S. medical schools.

The primary and secondary school face challenges in quality and funding

- **Challenges in quality:** Saba's primary school did not meet the Education Inspection's base quality standards in 2023–2024. In addition, the school boards showed weaknesses in internal supervision and overall quality management.
- **Challenges in funding:** The current funding system does not adequately account for factors affecting education costs on Saba, as concluded in research done by EBA.¹⁸ This relates to newcomers (children speaking a different language than English), special care needs, growth in number of students, price and wage differences which are specifically for Saba, and maintenance costs.

Environmental pressures underscore need for sustainability

- **Environmental pressures:** Saba's natural environment faces increasing stress from local and global factors, such as erosion, invasive species, and climate change. These pressures threaten both the island's climate resilience and its economy. For example, ecotourism depends on healthy nature.

As an example, coral cover has decreased rapidly in the last 25 years to 2 percent, down from 24 percent in 1991.

- **Sustainability initiatives:** Projects under the Nature and Environment Policy Plan (NEPP) aim to strengthen Saba's ecosystems.¹⁹ Furthermore, ambitions in renewable energy target fully climate-neutral energy production by 2030. Currently, over one-third of Saba's electricity production is sourced from renewables.

Public health concerns persist, with a substantial share being overweight

- **High overweight prevalence:** In 2021, 71 percent of Saba's population was overweight, including 39 percent classified as severely overweight. Overall perceived health has slightly declined since 2013, with 76 percent reporting feeling well or very well in 2021.

SWOT analysis

Based on the baseline situation and stakeholder discussions, the strategy identifies Saba's key challenges to address as well as its assets that provide a foundation for sustainable development. Opportunities for economic development can be pursued if threats and weaknesses are carefully managed. The SWOT analysis is presented on the next page.

¹⁷ Economisch Bureau Amsterdam (2024).

¹⁸ Van Buiren et al. (2025).

¹⁹ Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020).

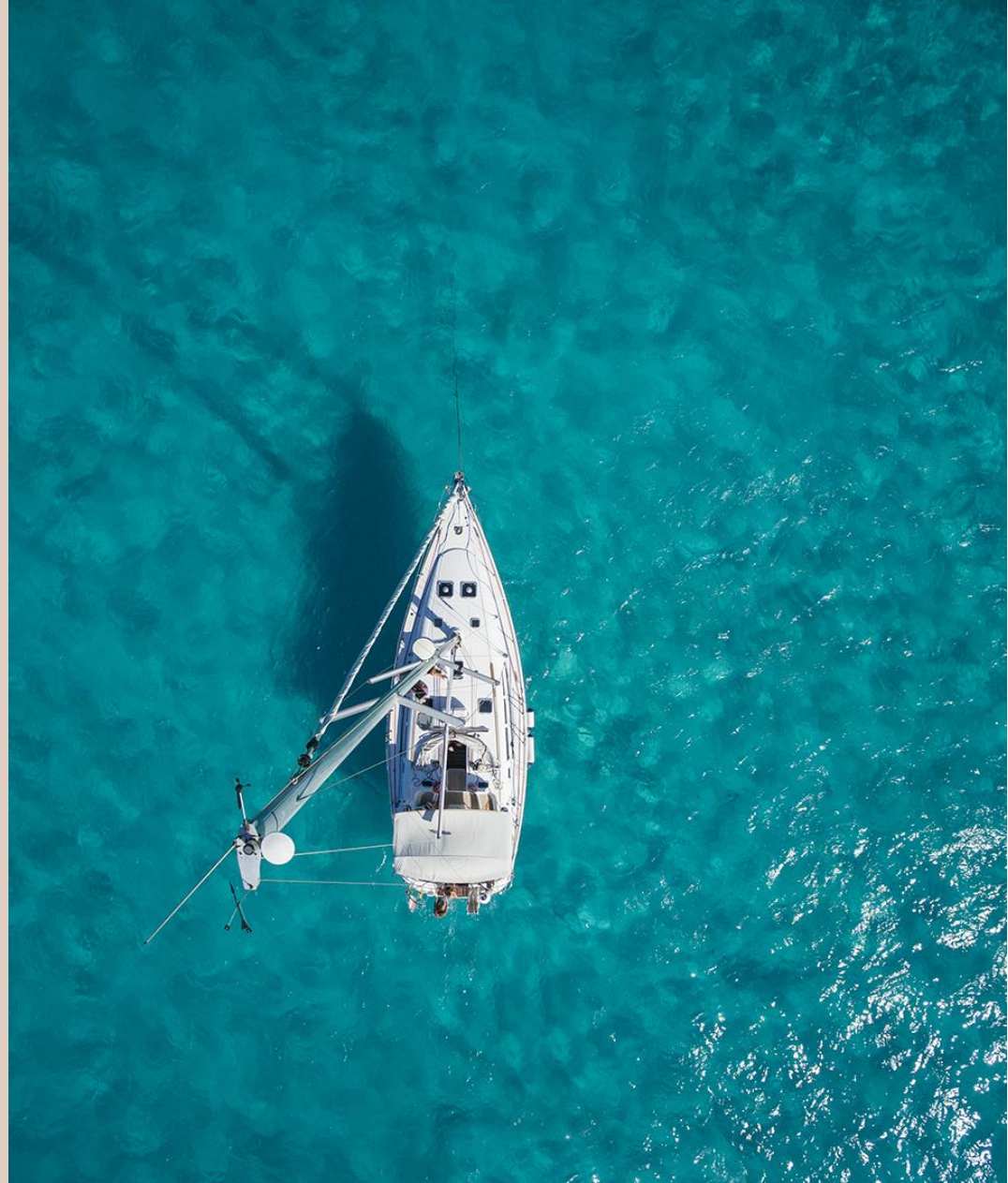
Context and baseline situation

Table 1: The strategy addresses Saba's weaknesses and threats, using and preserving its key strengths and opportunities

Strengths	Weaknesses
<ul style="list-style-type: none"> • Nature and authenticity • Position as a public entity within Netherlands • Sense of community, safety, and social cohesion • Stable and professional local administration 	<ul style="list-style-type: none"> • Limited and costly connectivity • High cost of living • High cost of doing business, ease of doing business, weak business institutions • Lacking/limited production capacity (geography, undivided properties) • Economic dependency on public sector • Crowding out private sector in labor market • Limited implementation capacity and budget of public entity • Small scale labor force and market size • Limited public facilities and basic services (hospital, education, banking, etc.) • Housing market
Opportunities	Threats
<ul style="list-style-type: none"> • Blue economy and knowledge-based exports • Eco- and high-end tourism • Energy transition and sustainability • Relationship with the EU and access to funding 	<ul style="list-style-type: none"> • Aging population; pressure on infrastructure, labor market and health care • Pressure on nature; erosion • Climate change; increasing risk of hurricanes • Geopolitical developments (U.S.) and national politics • Food security (reliance on imports) • Population health • Brain drain • Reliance on Saba Medical School

Source: Economic Bureau Amsterdam (2026).

3. Vision, principles, and objectives



Vision, principles, and objectives

This chapter presents the overall strategy, providing a top-down view to ensure coherence and alignment across all actions. By taking a step back first, the strategy's overarching goal is articulated, and its primary contours are outlined. This will help avoid the strategy turning into a mere list of projects, policies and investments, and help create a coherent, long-term vision with clear prioritization and connection between measures.

The **vision** articulates what the strategy aims to achieve and highlights the overarching direction. The **principles** ensure the strategy is grounded in realism, coherence and practical applicability. The **objectives** provide a high-level view of the strategy focus areas, offering a perspective before diving into detailed priorities and policy directions.

Vision

Achieving sustainable and inclusive welfare growth by strengthening self-reliance, protecting Saba's natural and cultural heritage, enhancing living conditions and the business environment, and building resilience against long-term challenges.

This vision encompasses the following goals:

- **Moderate and sustainable welfare growth:** Pursue gradual, sustainable welfare improvements that enhance the well-being of Saba's population within the island's structural and demographic constraints. This aim for growth prioritizes a broader measure of welfare, extending beyond GDP and material prosperity, often referred to as 'inclusive and sustainable well-being'.
- **Natural environment and culture:** Protect and value Saba's natural and cultural assets through sustainable tourism, climate adaptation, and disaster preparedness.
- **Quality of life and business environment:** Improve access to and affordability of essential services to lower living costs, attract investments, and support private sector development.

- **Long-term resilience:** Strengthen the capacity to respond to long-term challenges, such as aging, population health, climate change, and geopolitical developments.

Principles

The socio-economic development strategy for Saba is founded on four principles that ensure its realism, coherence, and practical applicability:

1. **Realistic:** The strategy recognizes the island's small scale, external dependencies, and structural economic limitations. It acknowledges that, due to the island's strong dependence on imports and on the public sector, Saba's economy will not be able to sustain itself independently in the foreseeable future. While economic opportunities must be identified and utilized, particularly in sustainable tourism, the blue economy, and sustainable energy, their overall macroeconomic impact will remain modest. In addition, space is limited and geographical conditions are complex. Therefore, the strategy focuses on achievable progress and enhanced socio-economic circumstances rather than rapid or large-scale growth.
2. **Coherent:** The strategy takes a coherent approach by incorporating preconditions for sustainable development, and aligning priorities, as well as interdependence of policies, projects and investments.
3. **Guiding framework for the public entity and central government:** The strategy provides a shared framework and guideline for both the Public Entity Saba and the central government of the Netherlands, promoting commitment, coordinated decision-making, targeted planning of policies, projects, and investments, and accountability.
4. **Clarity for the public and for private sector:** The strategy offers clarity on the island's medium and long-term direction, providing predictability for the public and for the private sector.

Vision, principles, and objectives

Objectives of strategy

Based on the vision, a set of objectives is defined, one for each policy area. Each objective describes an **overall goal** along with the **key focus areas** for achieving it. These objectives have been tested with key stakeholders on Saba. The next chapter will elaborate on these focus areas, detailing strategic priorities and policy directions.

Table 2: The set of objectives stems from the vision per policy area, along with key focus areas.

Objective per policy area	Policy directions
Pre-conditions	
<i>Establish these as prerequisites for reaching socio-economic objectives, touching upon multiple policy areas</i>	<ul style="list-style-type: none"> • Improve connectivity • Fasten labor migration procedure • Expand (affordable) housing • Improve statistical overview • Ensure implementation capacity
Economy and labor market	
<i>Pursue gradual and sustainable welfare improvements, by diversifying the economy, improving income stability and strengthening self-reliance.</i>	<ul style="list-style-type: none"> • Develop high-value, small-scale tourism • Expand blue economy and knowledge exports • Subsidize energy and invest in renewable production • Improve the business environment • Address labor market distortions and prevent private sector crowding out
Infrastructure	
<i>Provide reliable infrastructure that supports sustainable development, including affordable connectivity.</i>	<ul style="list-style-type: none"> • Fix physical backlogs and improve funding structure • Improve digital connectivity
Cost of living	
<i>Structurally control, and where possible, lower the cost of living.</i>	<ul style="list-style-type: none"> • Facilitate in lowering the cost of (food) imports • Explore consolidated freight options
Demographics and health	
<i>Ensure demographic balance and social cohesion, with controlled migration.</i>	<ul style="list-style-type: none"> • Fill labor gaps and ensure integration • Prepare for an aging population

Education	
<i>Strengthen education as a cornerstone of long-term development, enabling individual opportunity and social mobility.</i>	<ul style="list-style-type: none"> • Enhance quality and funding • Engage the Medical School
Nature	
<i>Maintain healthy ecosystems as economic and ecological pre-conditions for sustainable development.</i>	<ul style="list-style-type: none"> • Improve climate resilience and self-sufficiency • Ensure sustainable tourism balanced with nature

Source: Economic Bureau Amsterdam (2026).

The measures included in the strategy are expected to jointly support sustainable and structural GDP growth through several channels: by stimulating higher-value economic activity (notably in tourism and local businesses), increasing productivity (through a more balanced and skilled workforce and better public services) and improving the quality and reliability of infrastructure (e.g. energy, transport, digital). In addition, it improves Saba's resilience against long-term threats, e.g. aging and climate change. It is important to recognize that these policy areas are interconnected and should not be considered in isolation. Together, they contribute to social and economic development, with all objectives reinforcing one another. For example, a thriving economy depends on reliable infrastructure and targeted labor migration, and welfare growth relies on protecting natural resources on which it is built.

While this strategy places particular emphasis on the economy, the aim is to create a coherent framework in which policy objectives extend beyond purely 'economic' themes. In doing so, it aligns with other existing and ongoing plans that focus on complementary areas. The focus is on welfare which extends material well-being, including household income and purchasing power, quality of life, health, work, housing, society, and the state of nature.

4. Strategic priorities and policy directions



Strategic priorities and policy directions

First, the pre-conditions, which are essential for achieving the objectives across multiple areas of socio-economic development, are discussed. This is followed by policy directions per theme. These policy directions include specific (prioritized) policies/projects/investments that are meant to provide concrete guidance for the short term, while aligning with the long-term vision and supporting the achievement of medium- and long-term objectives outlined in the previous chapter.

Pre-conditions

Certain pre-conditions must be established to provide a solid foundation for future development of Saba. These measures are essential for the successful implementation of the strategy, are foundational to multiple thematic areas of socio-economic development, and fall mostly within the control of the local and central government.

They get broad support among stakeholders and are considered 'no-regret' measures: their implementation is beneficial regardless of the specific direction future development takes.

1. Connectivity

Measure	Priority	Cost	Responsibility	Benefits
PSO air transport	Urgent	\$ 3.8-7.6 mln. annually*	Central Govt	Welfare gain and driver for growth
PSO ferry	Urgent	€ 1.5 mln. annually**	Central Govt, PES	Welfare gain and driver for growth

* The subsidy for a new PSO depends on the volume of the ferry services and the tariffs. These amounts are estimates from the study by SEO in 2023. Corrected for inflation the estimated costs are between 3.9 and 7.8 million dollars. **This estimate is based on the current ferry PSO and is equal to 1.7 million dollars. The subsidy for a new PSO depends on the volume of the ferry services and the tariffs.

Both residents and visitors rely on airline and ferry transport, yet limited frequency and the high, rising costs of airline tickets have become a critical concern. Over the

years, ticket prices have increased while service options have diminished, creating a situation that stakeholders describe as urgent.

Reliable and affordable transport to and from the island is vital to social and economic development. Connectivity directly affects tourism, as the ability of visitors to reach the island determines the success of even the most attractive offerings on the island. Broader social implications relate to the dependence of residents on transport for essential services. For example, access to specialist healthcare or other vital services in Sint Maarten and personal development opportunities in which exposure to experiences outside the island helps young people gain perspective.

- **Public service obligation (PSO) for air connectivity:** Market failures justify the implementation of a PSO for the Saba-Sint Maarten and Sint Eustatius-Sint Maarten routes, characterized by the limited number of passengers and dependence on a single airline (Winair).²⁰ The Curaçao-based Dutch Caribbean Islandhopper is scheduled to begin passenger flights from Sint Eustatius in 2026.²¹ However, it is uncertain whether Saba will be included in these routes and, even if it were, this would not provide the structural solution for connectivity that the island needs. The preferred approach is a Restricted Access PSO, which sets transport requirements and includes a subsidy, allowing the airline to achieve sufficient returns. The requirements will primarily concern continuity, regularity, pricing, and minimum capacity.²² The PSO is expected to double passenger movements and significantly increase consumer welfare.²³ The maximum ticket price in SEO's scenario is set at 50 dollars for a return flight (which is currently around 400 dollars). The estimated government subsidy ranges between 3.8 and 7.6 million dollars annually (corrected for inflation), which is comparable to the transport subsidy for the European Netherlands, according to SEO's analysis in 2023. Implementation requires a modification of the BES Aviation Act, with a

²⁰ SEO Economisch Onderzoek (2018).

²¹ Dossier Koninkrijksrelaties (2025).

²² Ministry of Infrastructure and Water Management (2025).

²³ SEO Economisch Onderzoek (2023).

Strategic priorities and policy directions

target date of October 1, 2026. Following this, preparations include determining transport demand, defining PSO requirements, and consulting aviation stakeholders. This process is likely to confirm that a Restricted Access PSO is the most feasible approach, leading to the next step: a tender process.

- **Continued PSO for ferry service:** Ferry services are not expected to have a large substitution effect on scheduled flights (a maximum of around 10 percent, as concluded in SEO's report in 2024). This highlights that ferry transport complements, rather than replaces, air PSOs in improving connectivity. In addition, establishing a ferry PSO is comparatively time-efficient, as the instrument has been implemented previously and therefore does not require the development of a new legal framework. The current ferry PSO pilot has been extended, providing a 1.5 million euros (1.7 million dollars) subsidy for 2026 and 2027 (covering both Saba and Sint Eustatius). However, this extension remains temporary, and it is important to establish a structural solution to ensure the continued provision of reliable and affordable ferry services.²⁴

2. Labor migration

Measure	Priority	Cost	Responsibility	Benefits
Fasten procedures for hiring foreign workers	Urgent	-	IND, Central Govt	Private sector growth
Work permit exceptions	Urgent	-	PES, Central Govt	Public sector capacity Fill critical shortages

Stakeholders across various sectors, including business and hospitality, education, and healthcare, identify the lengthy migration process as a major bottleneck. They report that, even with complete documentation, approvals can take four to six

²⁴ Public Entity Saba (2025a).

²⁵ State Commission Demographic Developments Caribbean Netherlands 2050 (2024).

months, causing prospective employees to lose interest. This also affects recruitment of international students for the Medical School.

Sustainable economic development cannot be achieved without the ability to attract and retain the necessary workforce. Ensuring a smoother and faster migration process is essential to support economic growth and diversification, as it enables the island to address critical labor shortages in both quantity and skill level.²⁵ This is particularly important for Saba, which faces the dual challenge of a small labor force and aging population.

- **Streamline work and residence permits:** Start a project to assess the causes of the lengthy migration process and possibilities to address delays directly.
- **Work permit exceptions:** Priority should be given to critical sectors, such as healthcare, education, as well as sectors targeted for growth, for example high-value tourism. Without this focus, key roles remain unfilled, creating an impediment to growth. Current lists of exceptions for work permits should be updated to align with the development strategy.

3. Housing

Measure	Priority	Cost	Responsibility	Benefits
Continue (social) housing efforts	High	-	PES, Central Govt	Accessible housing
Housing vision	High	-	PES, Central Govt	Coherent, future-proof planning, accessible housing
Foreign ownership	Medium	-	PES	Accessible housing

Affordable housing on Saba is lacking, posing challenges for both residents and incoming workers. Housing contributes to rising living costs, limiting welfare growth. For example, with shortages of social housing, income-eligible households are forced into the private rental market, where prices have risen sharply.²⁶ Moreover, as

²⁶ Van Buiren (2024).

Strategic priorities and policy directions

demand for labor rises in essential sectors and the island pursues private sector development, sufficient affordable housing is required to accommodate the workforce. Moreover, affordable housing contributes to controlling the cost of living as well as wage development.

Housing availability is also closely linked to addressing brain drain, as graduates are more likely to return after studying abroad, if basic services, including housing, are in place. Ensuring sufficient, suitable housing is therefore essential for maintaining basic services, supporting economic growth, attracting talent, and enabling long-term development. Furthermore, economic growth must be planned realistically, considering the limited space for housing on Saba.

- **Continue (social) housing efforts:** There are ongoing initiatives, such as the Letter of Intent²⁷ and the Policy Agenda on Housing and Spatial Planning Caribbean Netherlands²⁸, that aim to create more affordable (rental) homes. Efforts include realizing 50 affordable homes by 2030 and financially supporting self-construction of houses. Further efforts to encourage affordable housing include introducing regulations and a rental housing committee and rental subsidies. Continuation and timely updates of these policy efforts are essential. The Saba Package Agreement also outlines ambitions to improve social housing.
- **Housing vision:** A plan for developing a housing vision is scheduled for 2026. This plan should integrate the Saba-specific Spatial Development Plan, currently under development, which identifies affordable and climate resilient housing as one of ten spatial priorities. Furthermore, future housing supply should also reflect the types of migration associated with Saba's economic development. The State Commission on Demographic Developments anticipates greater demand for family and couple housing and less for single-person units. Lastly, this plan should include housing that is suitable for older residents to help prepare for an aging population, as highlighted by

²⁷ Rijksoverheid (2023).

the State Commission. Construction of elderly accommodation has already begun, with specifically the nursing home in The Bottom, which started in 2023. There is not yet a clear picture of housing needs, although it is expected that additional housing will be required. The Ministry of Housing and Spatial Planning is currently working on housing needs data, which is expected to provide a clearer understanding of the demand at the beginning of 2026.

- **Foreign ownership regulation:** Effective regulation is essential to keep housing accessible. Stricter policies should be implemented to control foreign property purchases. Cases of foreign buyers acquiring real estate, without intent to reside or develop them, leave housing and hotel capacity vacant and drive up prices, disadvantaging residents and limiting tourism development. The influence of foreign ownership is also noted in the draft Spatial Development Plan.

3. Statistical overview

Measure	Priority	Cost	Responsibility	Benefits
Identify data gaps	Urgent	-	PES, CBS, Central Govt	Clear data collection
Collect data	High	-	CBS, Central Govt, PES	Better policymaking

Timely and reliable statistics are essential for effective, data-driven policymaking and -evaluation on Saba. Currently, the data published by the CBS often lags several years, making it difficult to get a clear picture of the current situation. For many topics, the most recent releases available are from 2022. Updated and more detailed data are particularly needed for tourism (e.g. to track visitor numbers and spending), the labor market (e.g. to identify key shortages), sector turnover, (future) housing needs, and trade routes. Stakeholders have also raised concerns about the accuracy of existing data.

²⁸ Ministry of Housing and Planning & Ministry of Interior and Kingdom Relations (2023).

Strategic priorities and policy directions

- **Map out data needs:** Identify or determine which data are essential for policymaking and carrying out this strategy.
- **Collect data:** Gather new information through surveys, administrative records, and censuses, and set up processes for regular updates.

4. Implementation capacity

Measure	Priority	Cost	Responsibility	Benefits
Public entity capacity	Urgent	-	PES, Central Govt	Better policymaking Implementation of strategy

Past failures to implement policy recommendations highlight the need for prioritizing the implementation stage, to ensure follow-through of this strategy. The implementation chapter will provide further detail on the proposed approach. Sufficient local capacity is a pre-condition for successful implementation of this strategy.

- **Strengthen implementation capacity:** Strengthening the capacity and executive power of the public entity is a key action area, as highlighted in the recent Cabinet Response to the RLI²⁹ and ROB³⁰ recommendations on the physical living environment in the Caribbean Netherlands.³¹ This bottleneck extends beyond the physical domain and affects the implementation in other domains, including the implementation of this strategy, as well. The capacity is under pressure due to insufficient availability of (qualified) personnel, challenging recruitment and selection procedures in a tight labor market, and a lack of structural financing.

Policy directions: Economy and labor market

Saba's economy is small and heavily dependent on the public sector. Policy directions for the economy and labor market should aim to enable realistic economic

²⁹ RLI = Raad voor de Leefomgeving en Infrastructuur ('Council for the Environment and Infrastructure').

³⁰ ROB = Raad voor het Openbaar Bestuur ('Council for Public Administration').

³¹ Ministry of the Interior and Kingdom Relations (2025a).

diversification. This can create gradual welfare improvements, by enhancing income stability and strengthening self-reliance. While most economic opportunities should be pursued by the private sector, the government should ensure that the necessary pre-conditions for doing business are in place, enabling local businesses to thrive and seize opportunities. Given Saba's specific context, focusing on the development of tourism and blue economy activities represents a realistic avenue.

High-value, low-impact tourism helps generate local benefits, while conserving Saba's natural assets

Measure	Priority	Cost	Responsibility	Benefits
Tourism Office budget	High	- (reinvest)	PES	Sector development in line with tourism vision Marketing and promotion
Government revenue	High	- (revenue)	PES	Reinvest in tourism/nature
Coherent investment planning	High	-	PES	Higher tourism value
Preserve cultural heritage	Medium	-	PES	Economic value and broader benefits, e.g. social cohesion
Yachting tourism	Medium	-	PES	Economic activity, tourism revenue

The goal is to achieve modest growth in scale but strong growth in value added and local benefits, aligned with the 2022-2028 Tourism Masterplan³². Tourism should generate opportunities for income diversification, benefit the local community, and balance economic development with nature conservation, respecting the island's scale and avoiding overdevelopment. This approach is consistent with the NEPP.³³

³² University of Central Florida (2023).

³³ Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020).

Strategic priorities and policy directions

The tourism sector contributes an estimated 7 percent of GDP, and doubling tourism could expand GDP by 8 percentage points.³⁴ These numbers illustrate the potential of tourism is moderate, but limited: while tourism value has growth potential, it cannot be expected to replace the government as the main pillar of the economy in the short or medium term.

- **Professionalize the tourism sector:** Strengthen the Tourism Office for marketing, promotion, and overall sector development in line with the tourism vision outlined in the Masterplan and in this strategy. This need has also been highlighted in the Tourism Masterplan and Letter to Parliament on economic development and diversification.³⁵
- **Enhance government revenues:** Introduce tourist taxation and reinvestment mechanisms that support community and environmental priorities. For example, a 50 dollar per-person tourist fee, suggested in the Masterplan, helps cover expenses of professionalizing tourism sector. This relates to Saba’s natural resources as well. In the Tourism Masterplan, a 25 dollars nature conservation fee is suggested, of which 15 dollars will be directed to the Saba Conservation Foundation.
- **Coherent investment planning:** The focus on eco- and high-value tourism, should guide investment decisions. Before approving new developments, for example the construction of a new hotel, it should be assessed whether these investments align with and contribute to Saba’s tourism vision. This is especially important for Saba, where the space for development is scarce.
- **Promote cultural heritage:** The upcoming cultural policy plan 2025-2035, developed by the PES, provides a framework for safeguarding Saba’s cultural heritage.³⁶ Beyond its economic value (mostly through tourism), culture plays a broader role in fostering a sense of belonging and promoting physical and psychological wellbeing. The plan outlines specific policy

actions for heritage preservation and developing creative industries and cultural research. Furthermore, a Monuments Ordinance is being implemented through the listing of historic buildings. Insufficient fundings is noted as one of the challenges in the cultural policy plan; part of tourism revenues can be redirected to support these initiatives.

- **Expand yachting tourism:** The Black Rocks harbor can expand yachting tourism by attracting more visitors and increasing the average number of mooring days per yacht.³⁷ Detailed estimates of the potential impact on Saba’s GDP are not available.

Expansion of activities in marine- and sustainability-based research can drive economic diversification and nature preservation

Measure	Priority	Cost	Responsibility	Benefits
Stimulate sustainability/marine research	Medium	\$ 177,000 (annually)*	PES Non-profits	Economic activity and diversification Nature preservation

*The cost is estimated based on the 2025 PES annual budget, summing up the subsidy budgets for the Sea & Learn Foundation and the Saba Conservation Foundation.³⁸ Expansion of their efforts may require additional funding.

Saba’s maritime environment offers opportunities for developing a specialized blue economy. For example, the Saba Bank hosts some of the richest biodiversity within the Caribbean Sea, and a Marine Research Lab has been established already.

- **Stimulate marine research:** Encouraging the expansion of marine research in collaboration with academic and international partners helps generate economic activity on the island, build local skills, knowledge, and awareness through public educational initiatives. It can also inform evidence-based policymaking on Saba’s natural resource management. Saba already has an

³⁴ Analysis conducted by EBA, as detailed in the Baseline analysis chapter.

³⁵ Public Entity Saba (2023a). Attachment to Ministry of the Interior and Kingdom relations (2023).

³⁶ Draft version. Public Entity Saba (2025).

³⁷ Ernst & Young (2024).

³⁸ Public Entity Saba (n.d.).

Strategic priorities and policy directions

active base of non-profit organisations engaged in ocean-based (research) activities, such as the Saba Conservation Foundation and the Sea & Learn Foundation, supported by the NEPP.³⁹ Marine and sustainability research is in line with medium- to long-term ambitions for attracting a new educational institution focused on agriculture, sustainability, and nature.⁴⁰

Energy measures aim to improve affordability, ensure long-term sustainability, and support economic growth and diversification

Measure	Priority	Cost	Responsibility	Benefits
Energy subsidy	High	\$ 676,000*	Central Govt, SEC	Reduce household/business costs, support wage development, broader economic spillover effects
Structural financing renewable energy production	High	AEF**	Central Govt, SEC	Ensure sustainable, affordable energy long-term

* Estimated costs reflect a 40-dollar monthly subsidy per connection (households and businesses, 1,408 total in 2024), corresponding to the increase in electricity expenses following the end of the subsidy. Additional allowances for low-income households are not included.⁴¹ When adjusted for inflation costs amount to 691,000 dollar. ** The AEF report provides investment estimations, but this does not include structural financing.

Energy plays a critical role and has an impact throughout the entire economy. Measures should aim to improve affordability and support economic growth through wider positive spillover effects. Furthermore, structural financing will help ensure the long-term sustainability and affordability of renewable energy production.

- **Energy use subsidy:** High energy prices affect the entire economy and are largely under the control of the (central) government, unlike other high expenses as food and transport. Reintroducing energy subsidies that were scaled back at the beginning of 2025, would help reduce costs for

³⁹ Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020).

⁴⁰ Ministry of the Interior and Kingdom Relations (2023).

households and businesses, generating positive spillover effects across the wider business environment and economy.

- **Structural financing sustainable energy production:** The current investment structure for renewable energy is not financially sustainable. Both completed phases of solar panel installations have been financed through subsidies, meaning that depreciation is not covered by the regulated energy tariffs. According to the AEF report on the financial challenges of physical infrastructure in the Caribbean Netherlands, it is currently unclear how future replacement costs can be covered.⁴² When solar panels (20-year lifespan) and batteries (10-year lifespan) reach the end of their operational life, new investments cannot be funded through depreciation, creating a funding gap that threatens energy affordability and the progress of the transition.

Improving the business environment through better access to finance and banking, taxation, and postal services, will stimulate private sector growth

Measure	Priority	Cost	Responsibility	Benefits
Structural banking	High	-	Central Govt	Stimulate businesses, wider consumer benefits
Professional Chamber of Commerce	High	-	PES, Central Govt, Chamber of Commerce	Stronger business representation and support
Postal services	Medium	-	Central Govt	Stimulate businesses, wider consumer benefits

The business environment faces significant bottlenecks. High costs, complex administrative systems, and limited access to services make it challenging to do business on the island. Addressing these challenges is critical to unlocking the potential of local entrepreneurs and fostering private sector growth.

⁴¹ Ministry of the Interior and Kingdom Relations (2024) & CBS StatLine. Caribisch Nederland; aansluitingen en productie van elektriciteit en water.

⁴² Andersson Elffers Felix (2024).

Strategic priorities and policy directions

The custom tax and import systems present challenges for businesses, including the complexity arising from a highly detailed system of import codes. However, this system cannot be changed. Removing the ABB on transport would have very limited impact on prices.

- **Structural banking solution:** Limited access to financial services is a key bottleneck on Saba. While ING’s arrival is promising, reliance on a single private provider remains risky. Exploring options for a sustainable structural banking solution is recommended.
- **Professionalize the Chamber of Commerce:** The Chamber of Commerce is currently not equipped to provide full business representation and support. Businesses currently feel underrepresented, and professionalization of the Chamber would help address this. A professionally functioning Chamber would also be able to offer broader support to local businesses, including assistance for starting entrepreneurs, support in accessing the right loans and subsidies, tax filing, and more. Attracting executive capacity with sufficient availability would contribute towards achieving this.
- **Improve postal services:** Postal delivery quality has been insufficient in recent years. Implementing postal codes would improve the conditions for sorting and delivery efficiency.⁴³ EBA also recommends enforcing the obligation to transport mail on departing planes. Furthermore, the small and shrinking scale of the postal market requires financial support from the government to ensure sustainable postal operations.

Managing labor market distortions and strengthening private sector conditions will support a more balanced workforce on Saba

Measure	Priority	Cost	Responsibility	Benefits
Monitor and manage public-private gap	High	-	PES	Informed decision making, stronger private sector

⁴³ Economisch Bureau Amsterdam (2025b).
⁴⁴CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

Measure	Priority	Cost	Responsibility	Benefits
Structural public-private dialogue	High	-	PES, business associations	Better coordination, bottom-up approach
Local contractors	Medium	-	PES	Stronger private sector, local capacity building
Staff training	Medium	-	PES, ROA CN, business associations	Stronger private sector, skilled workforce

Public sector jobs have experienced the highest wage increase over the last years, and public administration and services, education, and healthcare are among the highest-paying sectors on Saba. As a result, it becomes increasingly difficult for the private sector to compete for labor, not only in wages but also in secondary employment conditions. This distortion is already noticeable in labor market data: the share of the labor force working in the public sector has increased to 66 percent in 2023.⁴⁴ This is important to consider and, where possible, address, particularly because economic diversification relies on a thriving private sector.

Furthermore, the aging population will reduce the working-age population, affecting the potential workforce in both the private and public sectors. Even if migration temporarily offsets these demographic changes and the aging population, and aging presents some opportunities for sector development and job creation, the overall trend is expected to weaken Saba’s economy by placing pressure on the labor market and welfare system. It is therefore important to prepare for the impact on aging; the policy directions on demographics provide further details.

- **Monitor and manage gap between public and private sector:** The gap between public and private sector is widening, not only in wages but also in secondary employment conditions and benefits.⁴⁵ While public wage increases may be justified, it is important to simultaneously be aware of their

⁴⁵ SEO Economisch Onderzoek & Vrije Universiteit Amsterdam (2025).

Strategic priorities and policy directions

impact on private sector competitiveness and to assure that this gap is managed.

- **Structural dialogue with private sector:** Structured communication between the public entity and private sector (employers, business associations) is currently limited. Establishing a regular dialogue helps improve coordination and align priorities, fostering a bottom-up approach in decision-making and ensuring local businesses are heard.
- **Involve local contractors in government projects:** Outsourcing government projects to foreign companies creates external dependencies on knowledge outside the island and limits opportunities to develop it locally. To address this, government projects could require or incentivize the inclusion of local contractors alongside foreign contractors and consultants. This would support local private sector benefits from public procurement, accommodate knowledge transfer, and build experience among local businesses, while not compromising on the necessary extra capacity.
- **Stimulate private sector staff training:** Subsidizing training and education can help raise skill levels within the private sector, narrowing the gap with the public sector and improving private sector secondary employment conditions. Stakeholder consultation indicated offering schooling was currently out of scope due to costs; government support could help make it feasible.

Policy directions: Infrastructure

Increased economic activity and climate change will place further pressure on Saba's infrastructure, making it essential to establish a strong foundation for the future. Addressing existing backlogs and reforming the funding structure are key to ensuring self-sustaining, future-proof physical infrastructure. At the same time, digital

connectivity remains vital for economic development. Although fixed internet coverage has improved significantly, gaps in mobile coverage remain.

Addressing backlogs in physical infrastructure, establishing sustainable funding, and building execution capacity will ensure future-proof infrastructure on Saba

Measure	Priority	Cost	Responsibility	Benefits
Fix infrastructure backlogs	Urgent	\$10 mln. annually*	Central Govt, PES	Future-proof infrastructure
Assure budget and change funding structure	High	-	Central Govt, PES	Sustainable financing
Assess climate resilience	High	-	Central Govt, PES	Less future damage
Increase execution capacity	Urgent	-	PES, Central Govt	Ensure implementation of projects

* Expressed in 2024 price levels. Estimate includes average yearly investment from 2025 to 2050.⁴⁶

Incidental grants, without provisions for maintenance and depreciation have led to a backlog in maintenance of Saba's physical infrastructure.⁴⁷ The RLI recommends substantial collaborative program between the central government and the public entity, focusing on strengthening the island's financial position and enhancing its implementation capacity.⁴⁸

- **Catch up with backlogs:** Address existing infrastructure backlogs and funding gaps, implementing the recommendations of the AEF report to ensure overdue maintenance is caught up and future maintenance is financed.
- **Change funding structure:** Set up a sustainable investment facility, a jointly managed fund by the central government and public entity, as proposed by the ROB, from which future investments can be financed based on a jointly developed investment and implementation agenda. This multi-year collaboration is also reflected in the Cabinet Response.⁴⁹

⁴⁶ Andersson Elffers Felix (2024).

⁴⁷ Raad voor het Openbaar Bestuur (2025).

⁴⁸ Raad voor de leefomgeving en infrastructuur (2025).

⁴⁹ Ministry of the Interior and Kingdom Relations (2025a).

Strategic priorities and policy directions

- **Assess climate resilience of infrastructure investments:** Integrate climate resilience into all future investments, which will be in line with the Saba Climate Plan.⁵⁰ Saba is prone to hurricanes, and climate change is increasing the risk of hurricane damage. With EU support, Saba is already aiming to integrate hurricane-resistance standards into its infrastructure by 2027.⁵¹
- **Increase implementation capacity:** Provide additional policy and operational support to strengthen the execution in the physical domain, which is necessary according to RLI and recognized in the Cabinet Response to the recommendations of RLI and ROB.

Ambitions to further improve digital connectivity should continue to support economic development

Measure	Priority	Cost	Responsibility	Benefits
Digital connectivity	Medium	-	PES, Satel, Central Govt	Full coverage
Telecom collaboration	Medium	-	Satel	Cost-efficient telecom

Stable digital connectivity is essential for economic development, emergency response, healthcare and education services.⁵² Ambitions to further enhance digital connectivity are still ongoing.

- **Improve digital connectivity:** While mobile coverage currently exceeds 95 percent on main roads, certain areas still experience limited or have no reception due to geographic constraints.⁵³ According to Satel, ambitions to further expand mobile coverage have currently been halted. They note the challenging local context is inadequately considered in relation to the standards Satel must meet. The Dutch Authority for Digital Infrastructure has granted Starlink a license to provide satellite communication on the BES

islands for a period of fifteen years, which may lead to benefits for Saba's population through increased available supply.⁵⁴

- **Explore telecom collaboration:** Establishing cooperation with international organizations and a partnership of Satel with a telecom supplier from the Netherlands or another country should be explored. This could help achieve greater scale and lower costs in providing digital connectivity.

Policy directions: Cost of living

The main goal is to structurally improve the economic wellbeing of residents and control living costs. The Minimum Income Standard Committee emphasizes the need to reduce structural living costs as a prerequisite for improving real income and social welfare. Controlling living costs also brings additional benefits, such as reducing pressure for higher wages, which supports Saba's tourism competitiveness.⁵⁵

Several aspects related to the cost of living have been addressed earlier in this strategy. For example, the PSO and ferry subsidy, along with affordable housing initiatives, have been identified as pre-conditions. Furthermore, energy subsidies, while previously focused primarily on businesses, also have a significant impact on households. This section examines the cost of living with a particular focus on food imports and other cost-of-living measures within the control of the governments.

Targeted measures in storage facilities, imports, and retail practices can help reduce the cost of living, by facilitating lower transport costs and supply chain efficiency

Measure	Priority	Costs	Responsibility	Benefits
Dry and cool storage	Urgent	\$ 2.8 million*	PES	Lower retail prices, increase food security
ABB on transport	Medium	-	Central Govt	Lower retail prices

⁵⁰ This plan is not published yet; intermediate information is provided by PES.

⁵¹ Girardi & Patrahau (2024).

⁵² Girardi & Patrahau (2024).

⁵³ Economisch Bureau Amsterdam (2023).

⁵⁴ Rijksinspectie Digitale Infrastructuur (2025).

⁵⁵ Van Buijen (2025).

Strategic priorities and policy directions

Measure	Priority	Costs	Responsibility	Benefits
Enable cargo on ferry	Medium	-	Sint Maarten, Central Govt	Lower retail prices, increased competition
Sell off-brand products	Medium	-	Retailers, PES	Lower retail prices
Lower margins basic goods	Medium	-	Retailers, PES	Lower cost of essential goods

* This information is obtained from a draft food security proposal part of the Climate Plan.

High food prices on Saba are driven largely by external factors beyond local control. However, several targeted measures can help mitigate costs and improve food affordability, as identified in research on the high prices on Saba. The current import system is one of the bottlenecks, causing delays in customs control at the harbor. However, simplifying it for Saban importers is considered unfeasible, as it depends on international agreements.

- **Dry and cold storage facility in the harbor:** Establishing storage facility, including cold storage, at the Fort Bay Harbor is a direct and feasible way to reduce retail prices, allowing retailers to purchase in bulk and achieve economies of scale, and maintain the cold chain.⁵⁶ This also helps increase food security by creating a buffer of supplies in case of supply chain disruptions, in line with the draft proposal on food security in the upcoming Climate Plan.
- **Remove ABB on transport costs:** To reduce overall retail prices, the feasibility of exempting freight costs from ABB can be investigated, as both wholesale price and freight costs are currently taxed, as proposed in the research on high prices on Saba by EBA. However, the impact of this measure on prices will be limited and the measure currently cannot count on support by the central government. Currently, both the wholesale price of most products and the transport costs of imports are subject to ABB. The Ministry of Finance indicates that this is primarily based on the General

Agreement on Tariffs and Trade (GATT), more in particular Article VII. After the consultation of the Tax Plan for 2024, the Ministry of Finance wrote in a letter that many countries tax the CIF value (cost, insurance and freight), whereas other countries do not. The Ministry of Finance advised the secretary of state to investigate the policy option to exempt transport from ABB. Such an assessment will include budgetary consequences, obligations by the World Trade Organization, the tax burden for businesses, feasibility for customs, and the extent to which this tax cut will be passed on to consumers. If transport costs were to be exempted from ABB in the future, the impact will still be limited. Assuming regional transport costs are 5 percent of the price and assuming a 6-percent ABB rate, costs for retailers will decrease by about 0.3 percent.

- **Enable cargo on ferry:** Allowing passengers to carry cargo on the Sint Maarten-Saba ferry could increase store options and competition for Saban retailers. The current restriction is due to a customs issue at Sint Maarten's harbor. While Sint Maarten is responsible, local and central government could explore including cargo services in a new ferry PSO or try and resolve the customs issue through Kingdom relations.
- **Sell off-brand products:** Selling off-brand products is a straightforward way to reduce living costs. This falls under the responsibility of Saban retailers and is already practiced to some extent. The local government can help facilitate this.
- **Lower margins on basic goods:** Applying lower margins on basic goods, subsidized by higher margins on non-basic or luxury goods, can help reduce the cost of essential goods.

⁵⁶ Economisch Bureau Amsterdam (2024).

Strategic priorities and policy directions

Facilitating collaboration and direct trade routes can improve supply chain efficiency and resilience, and reduce transport costs

Measure	Priority	Cost	Responsibility	Benefits
Consolidated freight	Medium	-	Importers, PES	Lower transport cost
Collaborate with Statia	Medium	-	Importers, PES, Central Govt	Lower transport cost
Engage the Chamber of Commerce	Medium	-	PES	Long-term coordination, better import practices

Certain measures can help improve the efficiency and resilience of supply chains, which in turn can reduce food import costs. However, these initiatives face challenges in implementation, making them less feasible to have immediate effects.

- Government-initiated collaboration:** Consolidated freight and joint imports can enable the scale needed for direct supply to Saba, bypassing Sint Maarten. A pilot conducted in 2019-2020 tested direct imports to Saba from Miami.⁵⁷ Alternative supply routes are feasible but require coordinated communication and collaboration among the government, retailers, and transporters. Collaboration between retailers appears possible if the government actively facilitates the process and the collaborative design minimizes mutual dependence. Ultimately, the government can support and facilitate, but retailers remain responsible for selecting alternative trade partners. The limited incentive to enhance the supply chain is a determinative factor affecting its success, largely due to the low level of competition across the sector.⁵⁸
- Collaborate with Sint Eustatius:** Collaboration with Sint Eustatius (government and retailers) appears key to making direct trade options feasible and is therefore recommended. Securing direct connection with Miami requires sufficient scale, which can be achieved by linking orders from Sint Eustatius into Saba's supply chain, as demonstrated in the pilot. This is currently

being investigated. Also, ships from Miami are often too large to dock in Saba's harbor, so Sint Eustatius would have to serve as a transit point. This collaboration requires commitment from both islands.

- Engage the Chamber of Commerce:** Once professionally operational, the Chamber of Commerce can actively coach and support entrepreneurs in optimizing imports and collaborative initiatives.

Policy directions: Demographics and health

Maintaining demographic balance and strong social cohesion is critical for Saba's socio-economic development, with key areas including migration and aging. Given Saba's projected demographic developments, these two topics are becoming increasingly important.

Furthermore, an aging population will place growing demand on health services, highlighting the importance of creating a coherent vision on elderly and healthcare, improving overall population health by integrating preventive care into policy, and strengthening regional cooperation, which helps overcome some of the limitations of Saba's small scale.

Targeted and controlled migration, with a focus on integration, supports Saba's economy while preserving social cohesion

Measure	Priority	Costs	Responsibility	Benefits
Statistical overview	High	-	PES, ROA CN, CBS	Targeted migration
Integration policy	Medium	-	PES	Preserved identity

Measures related to migration are partly addressed as pre-conditions, such as improving the lengthy migration process and enhancing statistical overviews, including labor market data. An aging population will put pressure on the potential working population, affecting both private and public sector, increasing the need for migration even more. Migration should be carefully targeted to meet the labor market

⁵⁷ Conclusions described in document which was received from Rijksdienst voor Ondernemend Nederland.

⁵⁸ Rijksdienst voor Ondernemend Nederland (2020).

Strategic priorities and policy directions

needs without straining the island’s infrastructure, space, housing market, and public services.

- **Statistical overview labor market:** Develop a comprehensive, up-to-date overview of the labor market to identify shortages and develop informed migration policy. This should cover both short-term gaps but also anticipate on medium- to long-term needs.
- **Integration policy:** To maintain Saba’s strong sense of community, social cohesion and cultural identity, targeted migration should be accompanied by an active integration policy. This could include inclusive programs, education, and language training. Social segmentation between locals and migrant workers should be prevented. The upcoming Culture Policy Plan can help guide these integration efforts.

Strengthening elderly support and regional healthcare cooperation, and focusing on preventive care is essential to prepare for aging and improve overall public health

Measure	Priority	Costs	Responsibility	Benefits
Elderly plan	Medium	-	PES	Coherent vision
Focus on preventive care	Medium	-	PES	Improved public health, mitigate economic impacts of aging
Regional cooperation	Medium	-	PES	More cost-efficient and higher quality healthcare services

The aging population of Saba will increasingly impact the demand for health services, housing, and mobility, growing the need for a coherent vision on keeping the elderly engaged in society, while addressing living conditions, loneliness, and other related issues. Additionally, emphasizing preventive care and public health can help mitigate the impacts of aging, and regional cooperation is recommended to enhance overall healthcare quality.

⁵⁹ Economic Commission for Latin American and the Caribbean (2025).

⁶⁰ Public Entity Saba (2023b).

- **Coherent plan for elderly care:** To current knowledge, a coherent vision or policy plan for elderly care on Saba does not yet exist. This should include topics such as accessible healthcare (for example, allowing residents to receive treatment without traveling), preventive health programs, additional housing, better living conditions, measures to prevent loneliness and poverty among the elderly, and (economic) participation in society. Developing this vision can bring together existing initiatives under a single steering group and foster collaboration between organizations and with the government.
- **Focus on preventive care and public health:** Preventive care and public health should be integral in policy making. Improved public health yields broad socio-economic benefits beyond just a healthier population; it reduces pressure on the welfare system and healthcare services and mitigates some of the negative economic impacts of an aging population. A healthier aging population can remain active in society for longer. Older people, particularly women, contribute not only through paid work, but also via unpaid activities such as caregiving for family members.⁵⁹ Saba’s current public health vision (2023-2026) focuses on healthy lifestyle promotion, preventing chronic diseases, and prioritizing mental health.⁶⁰ As this vision comes up for renewal, it will be important to update it and continue implementing actions in the areas where they are most needed.
- **Strengthen regional healthcare cooperation:** Intensifying regional cooperation helps address some of the limitations Saba’s medical care encounters due to its small scale. This is acknowledged both in the Cabinet response to the ‘Focused Growth’ report and in Saba’s response.⁶¹

⁶¹ Ministry of the Interior and Kingdom Relations of Netherlands (2025b).

Strategic priorities and policy directions

Policy directions: Education

A strong education system serves as a cornerstone of long-term development, enabling individual opportunity and social mobility. Education is also a key part of Saba’s economy, with the Medical School attracting international students and staff.

Well-funded educational investments are essential to provide high-quality schools and a stable environment that encourages families to settle

Measure	Priority	Cost	Responsibility	Benefits
Funding level and structure	Urgent	\$ 2.6 mln. annually*	Central Govt	Better planning, financial stability
Quality schools	High	-	Central Govt, school boards	Improved educational outcomes, settle environment

*Additional funding required by schools in 2025.

Primary and secondary education plays a central role in the development of children in creating a stable environment that encourages families to settle on the island. Strengthening both the funding structure and the quality of schools is necessary to meet these criteria.

- **Improve funding structure:** Develop a funding system that accounts for factors affecting education costs and differences between schools and BES islands, as concluded by previous research done by EBA.⁶² This should consider newcomers (children speaking a different language than English), special care needs, growth in number of students, price and wage differences specifically for Saba, and maintenance costs. The central government prepares increases in the funding and improvements of the funding system.
- **Improve quality of schools:** Quality education is crucial, as it shapes the students’ development and their opportunities for further education. It is also part of the basic services that need to be in place to encourage families to return or settle on the island. The challenges in quality, as well as at the

⁶² Economisch Bureau Amsterdam (2025c).

administrative level, are currently being addressed by the school boards and the central and local government.

The Saba Medical School faces challenges like a decreasing number of students

Measure	Priority	Cost	Responsibility	Benefits
Engage Medical School	Medium	-	PES	Better coordination

The Saba Medical School is the biggest private-sector employer on the island and generates economic activity by bringing in researcher and students. Improving migration procedures for both employees and students, which makes recruitment the biggest hurdle for the school, is already recognized as a precondition.

- **Engage the Medical School:** Structured dialogue between the public sector and the Medical School should be continued. This ensures the school remains an active stakeholder in government plans, keeps the government informed of the challenges, and strengths overall coordination and collaboration.

Policy directions: Nature

Conserving Saba’s ecosystems is both an economic and ecological pre-condition for sustainable development. Healthy ecosystems bring resilience against climate change but also serve economic functions as assets for tourism. Some environmental pressures are local, such as invasive species and erosion, while others, like climate change and the increasing risk of hurricanes, are beyond the island’s control.

Strategic priorities and policy directions

Strengthening Saba's climate resilience requires investing in nature conservation and increasing food security

Measure	Priority	Costs	Responsibility	Benefits
Nature conservation	High	\$ 257,000*	PES	Resilient ecosystems
Food security	Medium	\$ 3.8 million**	PES	Improve self-sufficiency and food security

*This is the annual Nature and Environmental Management budget for 2026-2028, which only covers salary costs. The 2025 budget was significantly higher at 1.7 million dollar; the required budget is likely to be higher than the current budget. **This estimation is based on the total budget for the draft food security proposal as part the upcoming Climate Plan (projects described below) and excludes the warehouse and cold facility as this has been included in the section on cost of living.

Healthy ecosystems play a critical role in reducing the island's vulnerability to climate change and extreme weather. While Saba cannot prevent climate change, it can strengthen the resilience of its ecosystems to minimize damage. The NEPP offers an integrated, interdisciplinary plan to managing the natural environment management in the Caribbean Netherlands.⁶³ For Saba, strategic goals include ensuring local benefits from healthier ecosystems, promoting a circular economy and restoring coral reefs.

At the same time, climate change is increasing the risk of supply chain disruptions, making Saba's strong reliance on imports a growing vulnerability and socioeconomic risk. Although realism is required as opportunities for food production will remain limited and Saba will always be dependent on external food sources, there are ways to improve food security by expanding local production.

- **Nature conservation:** Current activities focus on grazer removal, reforestation, coral restoration, education and awareness and other conservation initiatives. The allocated budget for 2026-2028 only covers salary costs and is significantly lower than 2025. It is therefore unclear whether the total budget is adequate to carry out the necessary nature conservation tasks.

⁶³ Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020).

Saba's response to the 'Focused Growth' report confirms this uncertainty surrounding local-level funding for the NEPP.⁶⁴

- **Increase food security:** The draft Climate Plan outlines proposals to improve self-sufficiency and food security on the island. Key initiatives include securing and expanding Hell's Gate Farm to cultivate a wide variety of vegetables, fruits, and poultry, which will provide locally produced food while creating employment opportunities. Upgrading the butcher station will enable professionalized processing with improved hygiene and efficiency. The introduction of mushroom farming at Hell's Gate Farm using coffee grounds from local cafés will promote circular economy practices, while a food forest will help restore soil health and provide year-round produce. Furthermore, a market for farmers and a community garden will provide residents with affordable access to materials needed for agriculture, while offering education on sustainable farming techniques and ecological awareness. Together, these measures create a more resilient and diversified food system that strengthens Saba's food security. It should be noted, however, that these measures operate on a limited scale, focus on a selected number of crops and activities, and Saba will remain dependent on imported food.

Sustainable ecotourism should generate local benefits while minimizing its ecological footprint, reinforcing incentives for nature protection

Measure	Priority	Costs	Responsibility	Benefits
Local benefits ecotourism	High	-	PES	Strengthen local incentives for nature protection
Require nature investment	Medium	-	Private investors facilitated by PES	Minimize ecological impact from tourism

⁶⁴ Public Entity Saba (2025b). Attachment to Ministry of the Interior and Kingdom Relations (2025b).

Strategic priorities and policy directions

Tourism development must be inherently linked with environmental protection. This should be implemented to ensure local benefits and income are generated from natural assets, both now and for future generations.

- **Local benefits of ecotourism:** Developing a tourism sector in such a way that it creates local economic value from nature reinforces the importance of protecting Saba's natural environment and strengthens this incentive for both policymakers and residents. Tourism development then remains inherently linked with environmental conservation. For example, coral reefs provide essential ecological value and require protection, while also delivering income through tourism, reinforcing the importance of conservation.
- **Require nature investment included for tourist businesses:** A tourist nature fee has already been proposed to offset the negative impact on Saba's natural environment. Not only visitors, but also tourism-related businesses should actively contribute to conservation, as their activities and developments can have negative environmental impacts. Since these businesses generate income directly from nature (through ecotourism), it can be expected from them to give back. Nevertheless, it helps preserve the assets the tourism activities rely on. Also, new developments should take nature into account. For example, strict guidelines should be followed to prevent soil erosion and deforestation, guided by the upcoming Spatial Development Plan. Additionally, tourism construction projects can be required to incorporate green investments as part of the design, reinforcing the vision of ecotourism.

5. Implementation and governance



Implementation and governance

Effective implementation requires more than a thematic program of measures. It depends on clear prioritization, continuous stakeholder engagement, sufficient and predictable funding, and a governance structure that clearly defines responsibilities, coordination, and accountability. Previous experience shows that a dedicated implementation structure is essential, as initiatives otherwise risk remaining at level of intent. Moreover, this framework must be applied in its entirety, across all domains, and cannot be treated as a menu of options to choose from. Only then can Saba effectively address the challenges it faces, now and in the future.

Priorities and implementation risks

The measures are categorized based on level of priority and implementation risk

Appendix B contains a full overview of all measures per policy area, including their level of priority, the responsible actors, the recommended time horizon for starting implementation, costs (where possible, estimated or adopted from other sources), expected benefits, and the implementation risk (high/medium/low). As cost estimates are unavailable for many measures, the total budgetary requirements extend beyond the costs identified in this list.

The implementation risk reflects the likelihood that a measure will not be implemented. For example, an ongoing measure that is recommended to be continued, such as renewing the PSO for the ferry, would be estimated as low implementation risk. In contrast, measures that are far-reaching, require lengthy processes with multiple actions, or involve many stakeholders and significant investments, such as fixing infrastructural backlogs, have a higher risk of not being implemented.

By combining priority and implementation risk, the measures are classified into a matrix, as presented in Figure 6. The bottom-right corner includes measures with urgent priority and high implementation risk. These measures require particular attention, as they are highly important while their successful implementation is risky. The top-right corner includes the *low-hanging fruit*: measures with high or urgent priority and a low risk of non-implementation once implementation has started.

Figure 6: Combining level of priority and implementation risk, it becomes clear which measures require particular attention

		Medium	Priority High	Urgent
Implementation risk	Low	<ul style="list-style-type: none"> Local contractors in gov't projects Engage the CoC in trade Engage Medical School 	<ul style="list-style-type: none"> Housing vision Professionalize CoC Structural dialogue public-private sector Statistical overview of labor market 	<ul style="list-style-type: none"> PSO ferry Work permit exceptions Identify gaps in data
	Medium	<ul style="list-style-type: none"> Regulate foreign property ownership Preserve cultural heritage Yachting tourism Stimulate sustainability/marine research Staff training private sector Digital connectivity Telecom collaboration Enable cargo on ferry Integration policy Improve health- and elderly care 	<ul style="list-style-type: none"> (Social) housing efforts Establish data collection Tourism Office Budget Tourism government revenues Coherent investment planning (tourism) Monitor and manage public-private wage gap Assess climate resilience of infrastructure Improve quality schools 	<ul style="list-style-type: none"> Streamline labor migration procedures Strengthen public entity capacity Dry and cool storage
	High	<ul style="list-style-type: none"> Focus on preventive care Improve postal services ABB on transport Sell off-brand products Lower margins basic goods Government-initiated collaboration of trade Collaborate with Sint Eustatius Regional cooperation healthcare 	<ul style="list-style-type: none"> Energy subsidy Structural financing renewable energy production Structural banking solution Assure budget infrastructure projects and improve funding structure 	<ul style="list-style-type: none"> PSO air transport Fix infrastructure backlogs Increase execution capacity Education funding level and structure

Source: Economic Bureau Amsterdam (2026).

Implementation and governance

To reach the overarching vision, the strategic program must be implemented in its entirety

Although individual measures in this strategy will improve certain elements of Saba's socio-economic context, the overarching goal will not be achieved if the strategy is not implemented as a whole. The strategy contains a set of preconditions and urgent priorities necessary to further develop the economy and welfare on Saba. If these prioritized actions, in areas such as physical infrastructure and connectivity, are not executed, further development will be slowed or halted. An integral implementation approach is therefore required.

Dialogue and bottom-up approach are essential to inclusive implementation

Inclusive and durable implementation requires continuous dialogue with stakeholders and a strong and consistent bottom-up approach. Stakeholders, such as entrepreneurs, foundations, and sector representatives, should be actively involved in further shaping the strategy and in setting priorities, ensuring that their perspectives and practical insights are incorporated. The successful implementation of this strategy ultimately depends on the active role of stakeholders and the sense of ownership they develop throughout the process. Given its long-term nature, sustained commitment and broad community support are required, as most investments will take time to materialize into tangible benefits.

- **Bottom-up approach in implementation:** A bottom-up approach should be integrated in the implementation. This includes aligning priorities through structured and ongoing communication with stakeholders in the private sector, clarifying which responsibilities they can assume, and ensuring that local businesses and organisation are meaningfully included in both decision-making during the project and execution of measures.
- **Community education and communication:** Sustained attention should be given to educating and informing the broader community. This should not be limited to the start of the program but should include regular updates on

progress, explaining what is happening and what this means in practice. Active management of expectations is essential, including transparent communication about the anticipated impacts, desired outcomes, and the time horizon over which benefits can realistically be expected.

Sufficient, timely, and structural funding is essential

Adequate, timely, and where necessary, structural funding is essential for the successful implementation of the strategy. The need for an improved funding framework is already recognized for many individual measures, including infrastructure investments, renewable energy, and education. Even with a well-designed governance structure, implementation will be hindered if financial resources are insufficient or uncertain.

Efforts in the physical domain, specifically to eliminate backlogs in infrastructure and housing, should be incorporated into integrated implementation agendas and financed through a dedicated investment fund, analogous to earlier recommendations by the Council of State.⁶⁵ By pooling the resources intended for the physical domain into a single fund, and by phasing and timing investments accordingly, spending can be made more efficient while better aligning with Saba's implementation capacity. The fund should be managed by an implementation agency that operates under supervision but remains at arm's length from both the Public Entity Saba and the central government. This structure would enable long-term delivery insulated from political cycles, ensuring continuity and effectiveness.

There is a need for more effective collaboration between the central and local government, supported by a centrally coordinated policy

Collaboration between the central and local government is considered challenging, and the central government approach is perceived as fragmented across policy areas. It is essential, both in general and for the achievement of this socio-economic strategy, that a coherent central government policy is developed for Saba in areas

⁶⁵ Council of State (2019).

Implementation and governance

such as the economy, demography, infrastructure and public services, and that the implementation of this policy is carried out in a coordinated manner. Assigning the coordination of all central government efforts to a single ministry could contribute to this objective.

Governance

Successful implementation requires a clear division of responsibilities

While a thematic implementation program is necessary, it is not sufficient to achieve integrated outcomes. Successful implementation requires a structured collaboration that clearly specifies, for all organizations and individuals involved, how responsibilities for execution, support, steering, monitoring, reporting, commissioning, escalation, and overall accountability are organized and assigned.

In the absence of such a structure, policies risk becoming fragmented, sub-objectives may take precedence over the overarching goal, accountability may be weakened, and the likelihood of successful implementation of the strategy will be reduced.

A clear governance structure also helps to address the lack of implementation capacity, as the Public Entity lacks sufficient capacity to take on these responsibilities in addition to its day-to-day tasks.

The recommended governance structure describes a way of working to implement the socioeconomic strategy and consists of three levels. Its objective is to ensure continuity, collaboration, and coherence in this long-term implementation. It provides clear mandates and accountability at all levels, while maintaining flexibility at the level of execution. The governance structure described in this chapter is a high-level proposal, which Saba and the Ministry of BZK should further elaborate.

1. Governance Table: The Executive Council of Saba and the Dutch government formally adopt the strategy and jointly act as the commissioning authority. Responsibility for different components of the strategy lies with the Public Entity Saba, the central government, or is shared between the two. Given this shared responsibility,

a Governance Table is established to steer the strategy as an integrated program. The Governance Table consists of a representative of the executive council of Saba and the Ministry of BZK.

2. Strategy Coordinator: Implementation of the socioeconomic strategy requires wide collaboration between different levels of government. A key role in the proposed governance structure is attributed to the Strategy Coordinator who is to be appointed to provide day-to-day coordination and oversight of implementation on behalf of the Governance Table. The strategy coordinator serves as a bridge between different departments tasked with executing parts of the strategy. When the implementation halts, the strategy coordinator offers advice and is able to escalate matters to the Governance Table when necessary.

The Strategy Coordinator steers the third layer of execution, monitors progress, reports to the Governance Table, and escalates issues when necessary. It may consist of a single individual with a strong mandate, supported by a secretariat. It commands the necessary authority with respect to the administrative services of the PES and the relevant ministries.

- **Dialogue and communication:** Recognizing that societal support is a prerequisite for successful implementation, the Strategy Coordinator organizes regular and structural dialogue with the private sector and civil society organizations. It is also responsible for communicating progress to the wider public.
- **Cross-island collaboration:** Although Saba and Sint Eustatius have a fully independent strategy and operate in different contexts, some challenges will be similar and efficiency gains may be achieved by collaborating amongst Strategy Coordinators.

3. Thematic execution: Execution is organized in the third layer. Tasks include monitoring progress towards the strategy's objectives within specific policy domains and preparing and delivering policy decisions, investments and projects. Tasks are

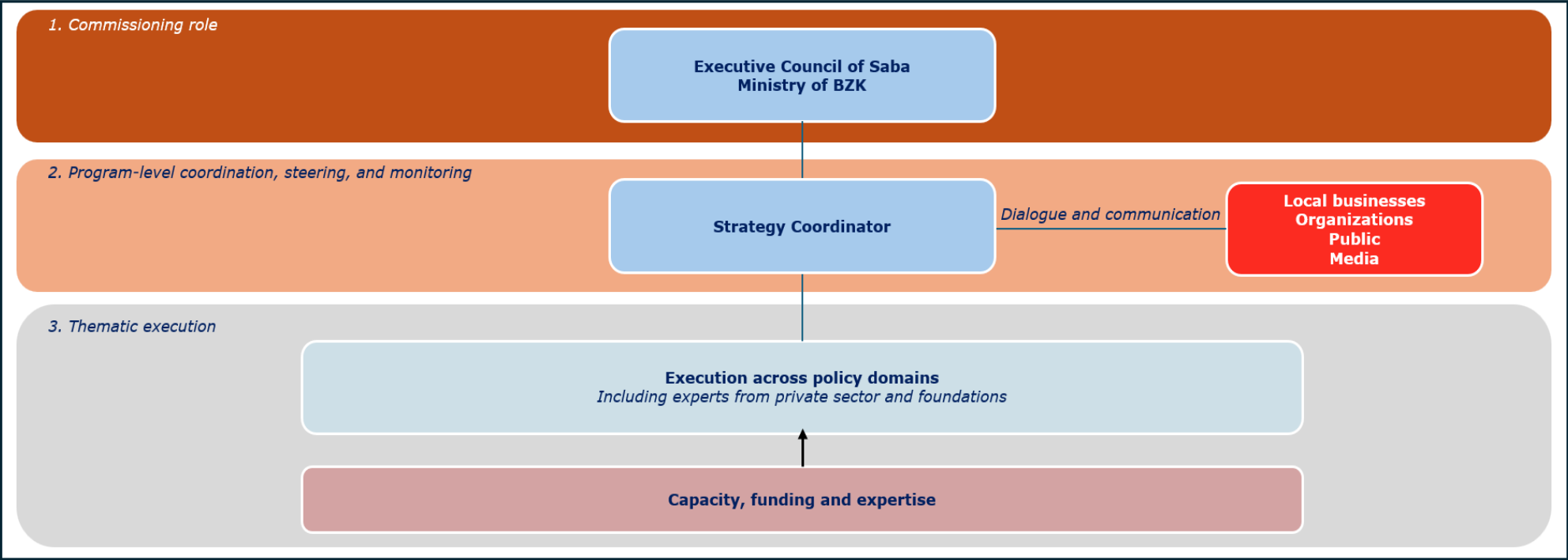
Implementation and governance

distributed across the policy domains relevant to the strategy. Wherever possible, these tasks are integrated within existing working structures to ensure it is as effective as possible Saba's small-scale context. Experts from the private sector and organizations should also participate in this layer. Foundations and government-owned companies already play a key role in areas such as education, healthcare, nature preservation and culture on Saba.

- **Ensured flexibility:** This structure provides flexibility by allowing working groups to be established within organizations outside the PES. Also, ongoing projects are accommodated within their existing capacity, and projects may proceed independently where appropriate to ensure efficiency. Recent efforts from PES to strengthen the governance of foundations and government-owned organizations further increase the capability of these organizations to contribute effectively to the implementation in their relevant areas.
- **Public entity capacity:** The strategy coordinator will work with the public entity and the Ministry of BZK to map the capacity, funding and expertise required to implement the strategy. of the strategy will, as much as possible, be integrated into existing structures and working groups.

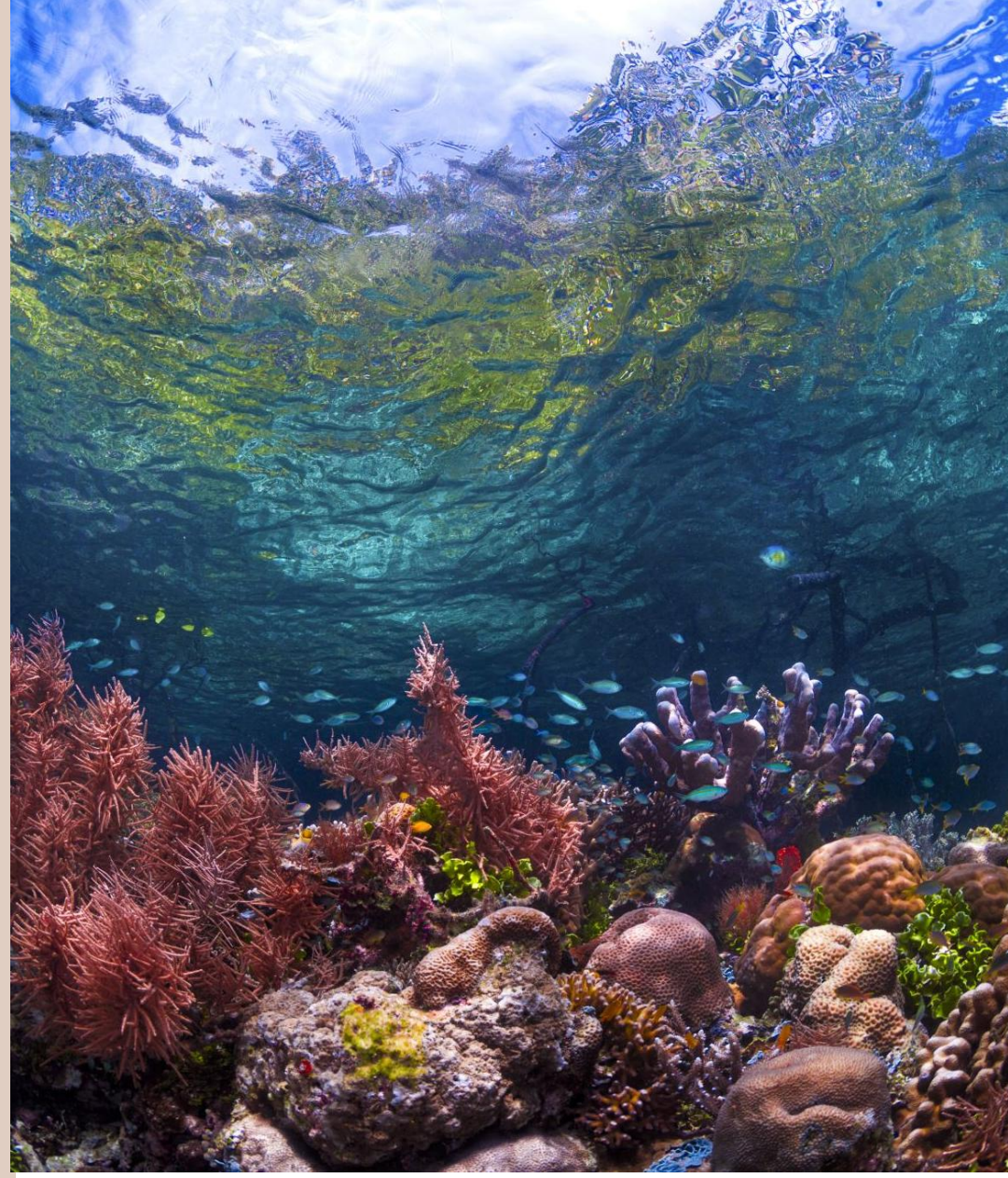
Implementation and governance

Figure 7: The recommended governance structure contains three levels, ensuring continuity of the program, while allowing for efficiency on executional level.



Source: Economic Bureau Amsterdam (2026).

Appendix A. Full baseline analysis



Full baseline analysis

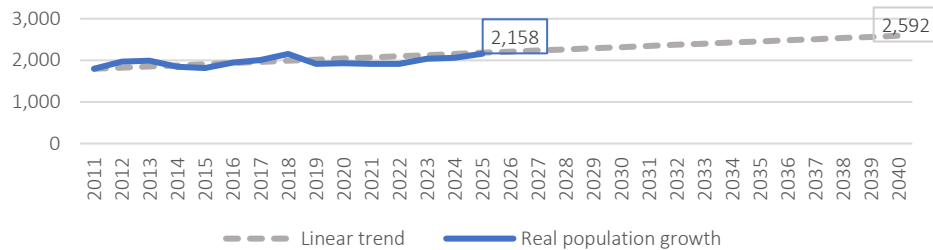
The baseline analysis outlines Saba’s current socio-economic situation by examining developments over the past 15 years and summarizing relevant research and advisory reports. The analysis covers the following areas: demographics and migration, economy, infrastructure, labor and income, education, culture and identity, environment and resources, and health and safety. This is followed by a benchmark analysis, comparing Saba with other islands in the Kingdom of the Netherlands and smaller Caribbean islands, and identifying relevant points in other economic strategies in the region.

Demographics and migration

Saba’s modest population growth in recent years is largely driven by migration, with an increasing share coming from Latin America. At the same time, the island faces rapid aging. Migration offers only a temporary buffer, as the rising old-age dependency ratio increases pressure on healthcare, housing, and infrastructure.

Saba’s population has grown slightly over the last 15 years, with most residents not born on the island

Figure 8: Saba experienced mild population growth over the last 15 years.

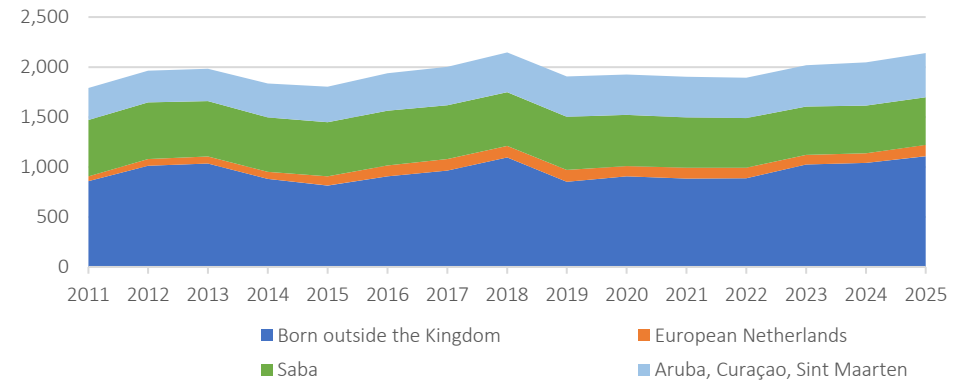


Source: Economic Bureau Amsterdam (2026) based on CBS⁶⁶.

⁶⁶ CBS StatLine. Caribisch Nederland; bevolking; geslacht, leeftijd, burgerlijke staat.

- **Saba’s population mildly increased since 2011:** Between 2011 and 2025, the population of Saba increased from 1,797 to 2,158 people. If a similar trend of 1.2 percent annual growth continues, the population is projected to reach approximately 2,592 people by 2040.

Figure 9: A large part of the Saban population originates from outside of the Kingdom of the Netherlands.



Source: Economic Bureau Amsterdam (2026) based on CBS⁶⁷.

- **Around half of Saba’s population originates from outside the Kingdom:** In 2025, 475 people (22 percent of the total population) are born on Saba. About half of the population originates outside the Kingdom of the Netherlands, increasing from 48 percent in 2011 to 51 percent in 2025. In particular, the share of Latin American migrants has grown, from 330 people (18 percent of total population) in 2011 to 585 people (27 percent) in 2025. A relatively large group (348 people in 2025) of Saba’s population was born on

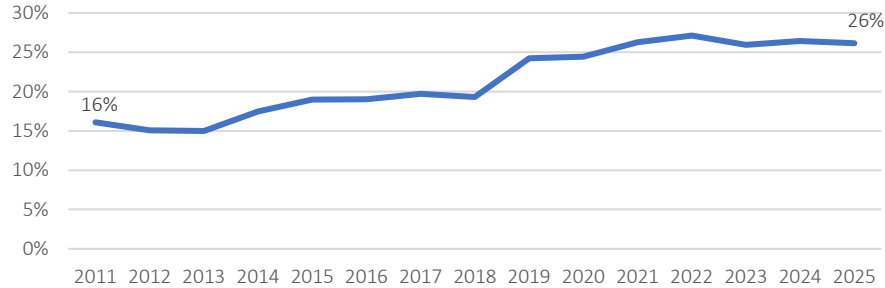
⁶⁷ CBS StatLine. Caribisch Nederland; bevolking, geboorteland, nationaliteit.

Full baseline analysis

Sint Maarten. This is largely explained by the presence of a bigger hospital on Sint Maarten, where many Saba women go to give birth.

Population aging is an emerging challenge for Saba, with migration offering only a temporary solution

Figure 10: The old-age dependency ratio increased to over 25 percent in 2025.



Source: Economic Bureau Amsterdam (2026) based on CBS⁶⁸.

- **Aging population:** The old-age dependency ratio (people aged 65 or older compared to the working-age population of 20-65 years) has increased over the past 15 years, from 16 to 26 percent. A ratio of 26 percent means there are roughly four working-age individuals for one person aged 65 or older.
- **Aging increases pressure on public services:** According to the State Commission Demographic Developments Caribbean Netherlands, population aging is expected to become a major challenge on Saba.⁶⁹ The State Commission stresses that issues such as loneliness and poverty may worsen, while housing, infrastructure and transport are not adapted to an aging population (e.g., no public transport). It is recommended to invest in high-quality housing for older people and prepare for a shrinking workforce, especially in care and education.

⁶⁸ CBS StatLine. Caribisch Nederland; bevolking, geslacht, leeftijd, geboorteland; 2011-2024.

- **Migration can temporarily reduce population aging:** In the short term, migration can reduce the old-age dependency ratio and fill labor shortages, but it is not a sustainable solution for population aging. The State Commission outlines several migration scenarios: in the high migration scenario, households increase from 1,030 in 2020 to 1,790 in 2050, keeping the old-age dependency ratio stable at 23 percent; in the medium migration scenario, the households rise to 1,150, with the ratio increasing to 35 percent; and in the low migration scenario, the population declines, households drop to 790, and the ratio reaches 55 percent by 2050.
- **Population growth increases pressure on space and infrastructure:** Overall population growth raises demand for Saba's limited space and infrastructure according to the State Commission.

Economy

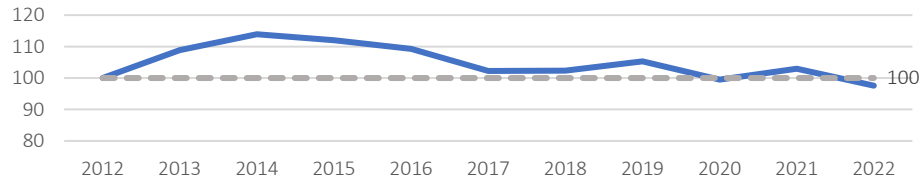
The economy has experienced both unfavorable and favorable developments. While real GDP, both in total as per capita, has declined, reductions in households below the social minimum and in income inequality indicate improvements in social outcomes. The economy is largely public-sector driven, with the three largest sectors being public administration and services, education (partly private), and health and social care. Tourism also accounts for a significant share of the economy, although overestimated, causing tourism growth to only moderately impact total economic growth.

⁶⁹ State Commission Demographic Developments Caribbean Netherlands 2050 (2024).

Full baseline analysis

Economic stagnation; small economy with high vulnerability

Figure 11: Real GDP per capita in 2022 is slightly lower compared to 2012.



Source: Economic Bureau Amsterdam (2026) based on CBS⁷⁰.

- **Real GDP per capita has decreased between 2012 and 2022:** Real GDP per capita has decreased by 6 percent between the reference year 2012 and 2022, after a period of strong growth between 2012 and 2014. This implies that the welfare on Saba has deteriorated.
- **Small economy with high vulnerability:** Saba's real GDP of approximately 45 million dollars in 2022 reflects the small scale of its economy. The economy is heavily reliant on tourism and imports⁷¹, as well as on employment in the public sector. The Saba Package Agreement⁷² emphasizes the intention to diversify the economy, though no specific plans are detailed.

The largest sectors of Saba's economy are public administration and services and education

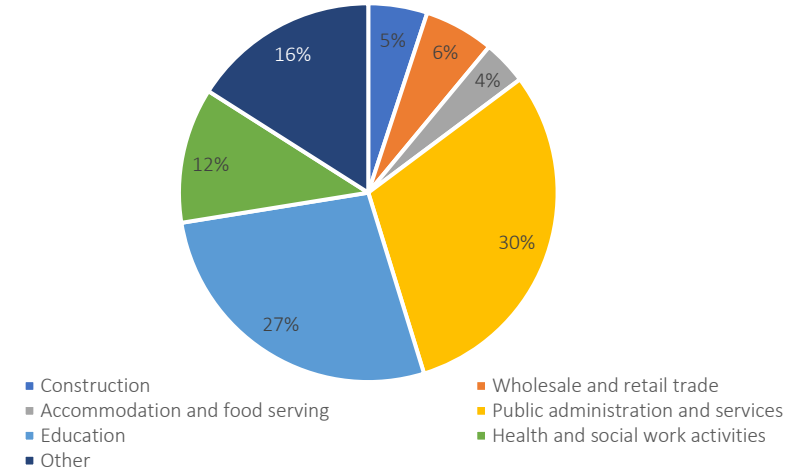
- **Public administration and services and education make up the largest part of Saba's economy:** The largest sectors of Saba's economy are public administration and services, and education, accounting for 30 and 27 percent of total income respectively, followed by health and social work activities (12 percent). Smaller sectors include wholesale and retail trade (6 percent), construction (5 percent), and accommodation and food serving (4 percent).

⁷⁰ CBS StatLine. Caribisch Nederland; bruto binnenlands product (bbp).

⁷¹ Girardi & Patrahau (2024).

Since sectoral GDP data is not available, sectoral shares are estimated by the product of employment and average income per sector, under the assumption that the ratio of profits to wages does not vary significantly across sectors.

Figure 12: Public administration and services and education make up a big part of the economy



Source: Economic Bureau Amsterdam (2026) based on CBS⁷³.

Saba has potential to improve its attractiveness for tourists

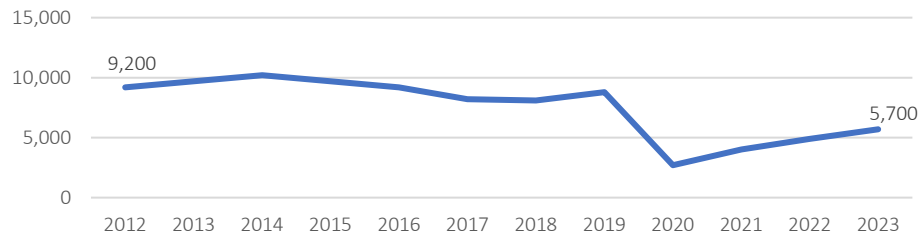
- **Tourism decline:** In 2023, 5,700 tourists arrived by plane, 38 percent fewer than in 2012. However, stakeholders have expressed concerns about the reliability of this data, making it difficult to draw firm conclusions. The decline might as well reflect administrative changes.

⁷² Public Entity Saba & State of the Netherlands (2023).

⁷³ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

Full baseline analysis

Figure 13: Tourism arrivals in 2023 are 38 percent lower than in 2010.



Source: Economic Bureau Amsterdam (2026) based on CBS⁷⁴

- **Improving accessibility:** Enhancing Saba’s connectivity through better and more affordable air and ferry connections makes the island more reachable for tourists, while lowering the cost of living and cost of doing business.⁷⁵
- **Steady financial resources:** Saba can secure reliable funding by expanding budgets and monetizing natural assets such as diving and hiking. The introduction of revenue measures, for example, a tourist entry fee or a nature conversation fee helps generate a constant revenue stream for the local government, as proposed in the Tourism Masterplan.
- **Stakeholder collaboration and community engagement:** Strengthening governance and coordination among tourism stakeholders, while actively involving residents in the development process will engage the Saban population in the tourism sector. Saban residents favor modest tourism growth, which can improve social and economic opportunities.
- **Capacity building:** Enhancing skills and resources for tourism product creation and service improvement can help increase revenues from tourism.

⁷⁴ CBS StatLine. Caribisch NL: inkomend toerisme per vliegtuig.

⁷⁵ University of Central Florida. (2023).

⁷⁶ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

⁷⁷ Tourism is assumed to account for 7 percent of GDP in 2025, similar to the pre-covid level of 2019, covering the culture, recreation and other services sector, and accommodation and food serving.

- **Competitiveness:** Increasing the quality of offerings and services on Saba can make Saba more competitive as a tourist destination.

High growth in tourism will only moderately increase the total GDP

- **Doubling tourism boosts economy by 8 percent:** A macroeconomic scenario analysis is carried out by EBA to measure the impact of tourism growth scenarios. In highest growth scenario, where tourism spending increases by 100 percent over the next 15 years, total economic output is projected to grow by approximately an additional 8 percent. In the lowest growth scenario, with a 10 percent increase in tourism spending, additional economic growth is estimated at 1 percent.

Table 3: Different scenarios of tourism growth moderately impact economic growth.

Growth tourism	Estimated additional economic growth
10%	1%
25%	2%
50%	4%
100%	8%

Source: Economic Bureau Amsterdam (2026) based on CBS⁷⁶.

- **Exploring different scenarios:** Multiplying each growth rate by the estimated share of the tourist sector in GDP of 7 percent⁷⁷ and a multiplier of 1.19⁷⁸ results in the different estimated growth scenarios. The tourist output-based share of 7 percent differs from the 24 percent share reported in the Tourism Masterplan, which reflects tourist expenditure rather than economic output. The model assumes no feedback effects, such as inflation and labor market responses. Therefore, it is intended to explore different growth scenarios, rather than provide precise forecasts.

⁷⁸ The model assumes a multiplier effect of 1.19, which is similar to Bonaire (as done in the Tourism Master plan). It is lower than the multipliers estimated for Curaçao or Aruba (1.64 and 1.68), reflecting Saba’s and Bonaire’s smaller economy and relatively higher reliance on imports (Economisch Bureau Amsterdam, 2025a).

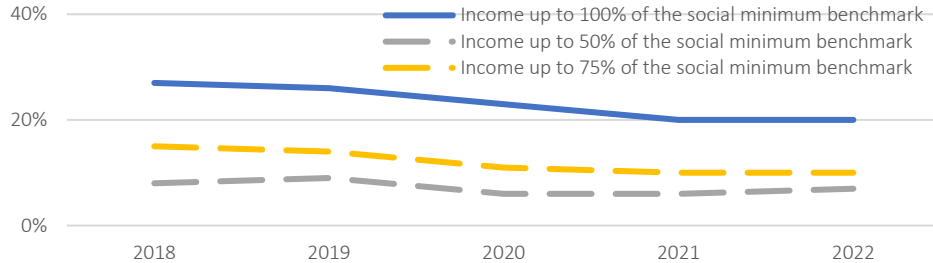
Full baseline analysis

Tourism growth also faces threats and negatively impacts the environment

- **High cost and limited accessibility constrain tourism growth:** Tourism development presents several challenges, as mentioned in the Tourism Masterplan. These include high business costs, expensive flights, a short runway, unreliable ferry services, a shortage of skilled labor, weak marketing and insufficient data collection, under-monetized natural resources, and limited or inconsistent tourism products such as hotels and activities.
- **Significant environmental consequences of tourism:** Tourism in the Caribbean has significant environmental effects, amplified by the island's small size, environmental sensitivity, and high visitor density. Direct effects include greenhouse gas emissions from travel and stay, and accumulation of (non-degradable) waste on the islands. Indirect effects involve construction in vulnerable areas, soil erosion and deforestation from increased housing and infrastructure, higher water and electricity use, and imports that contribute to CO² emissions.⁷⁹

Poverty levels have improved and income inequality has decreased

Figure 14: The share of households below the social minimum decreased since 2018.



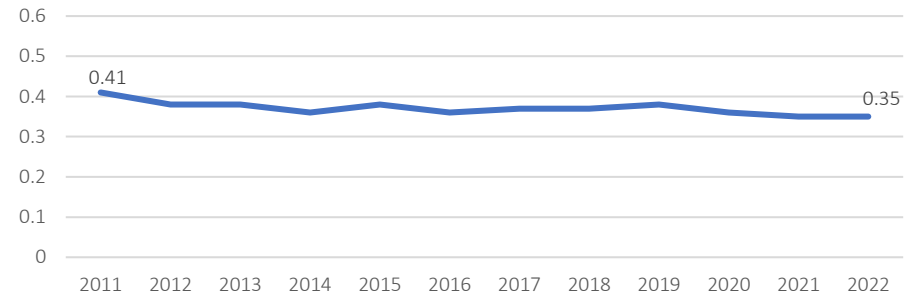
Source: Economic Bureau Amsterdam (2024) based on CBS⁸⁰.

⁷⁹ Maes et al. (2024).

⁸⁰ CBS StatLine. Caribisch NL; inkomen tot ijkpunt voor sociaal minimum.

- **Fewer households below the social minimum:** Despite a decline in real GDP, the share of households living below the social minimum fell from 27 percent in 2018 to 20 percent in 2022. The social minimum is defined by the Minimum Income Standard Committee of the Caribbean Netherlands and represents the income households need to cover essential livings costs.⁸¹ This decrease can be partly attributed to the rise in minimum wage in response to the Committee's findings. Since the publication of the social minimum, the minimum wage on Saba was raised by approximately 8 percent to 10.30 dollars per hour (1,785 dollars per month) in 2025.

Figure 15: The Gini coefficient of Saba has decreased since 2011.



Source: Economic Bureau Amsterdam (2026) based on CBS⁸².

- **Decrease in income inequality:** Over the past decade, income inequality has decreased, with the Gini coefficient dropping from 0.41 in 2011 and 0.35 in 2022. The Gini coefficient measures the income distribution within the population on a scale from 0 to 1, where 0 represents perfect equality and 1

⁸¹ Minimum Income Standard Committee of the Caribbean Netherlands (2023).

⁸² CBS StatLine. Caribisch NL; inkomensongelijkheid bij particuliere huishoudens.

Full baseline analysis

indicates perfect inequality. For comparison, the Gini Coefficient of the European Netherlands stands at 0.31 in 2024.⁸³

Infrastructure

Part of Saba's infrastructure requires upgrades or replacement. Maintenance and depreciation costs are estimated at 10 million dollar annually between 2025 and 2050, while large investment needs remain partially unfunded, particularly for the harbor, airport, roads, and utility infrastructure. Under the Saba Package Agreement⁸⁴, plans are in place for the construction of the new Black Rocks Harbor and connectivity improvements.

Connectivity is of vital importance to Saba, both economically and socially. Saba is connected to other islands by sea and by air. Affordable and reliable connections to surrounding islands are an issue of concern to the island.

Improving connectivity is vital for the Saban population and economy

- **Large challenges in connectivity:** Affordable and reliable airline and ferry services are essential to improving the connectivity to and from Saba, which is vital for the island's economic growth and tourism. Currently, connectivity is limited, and costs are high, posing financial, social, and health-related challenges. The Saba Package Agreement recognizes this, and the Dutch Government and Public Entity Saba are working to improve this.

Part of Saba's infrastructure is not in good condition, with high investment costs driven by planned expansions and overdue maintenance

- **Current infrastructure:** Saba has basic infrastructure including waste collection and export, water supply, electricity, government and school buildings, a small airport, Fort Bay Harbor, a main road network, limited telecom coverage, basic recreation facilities, and some heritage sites.⁸⁵

⁸³ CBS StatLine. Ongelijkheid in inkomen en vermogen; huishoudens.

⁸⁴ Public Entity Saba & State of the Netherlands (2023).

- **Planned investments in airport, public buildings, and a new harbor:** Required investments are highest during the coming years (2026 to 2030) due to replacement and upgrading of public buildings (for instance, many school buildings are in poor condition), the construction of a new harbor alongside improvements to the existing harbor and planned investments in the airport. The 2022 Airport Masterplan provides guidelines for development through 2042, accounting for projected passenger growth (from 30,000 in 2012-2019, to 62,000 in 2024 under the medium scenario).⁸⁶ In later years, investments focus mainly on asset replacements. Planned investments in recreational facilities (such as a swimming pool) and water management are less certain but have been included in the estimations by AEF.

Table 4: Investment costs are highest in the coming years, especially for buildings, the airport, roads, and the harbor. Substantial parts are still uncovered. Amounts x 1,000 US dollars.

Investment costs	2025	2026	2027	2028	2029	2030	...	2050
Waste processing	675	729	-	310	350	-	...	200
Uncovered*	475	-175	-	310	350	-	...	200
Wastewater	-	201	-	-	-	-	...	-
Uncovered	-	201	-	-	-	-	...	-
Cultural heritage	470	290	290	290	290	290	...	290
Uncovered	470	290	290	290	290	290	...	290
Drinking water	762	-	-	362	-	-	...	-
Uncovered	262	-	-	362	-	-	...	-
Buildings	4,431	14,231	8,029	7,307	-	-	...	-
Uncovered	65	5,581	8,029	7,307	-	-	...	-
Agriculture	143	1,151	-	-	-	-	...	-
Uncovered	143	1,151	-	-	-	-	...	-
Airport	1,429	447	5,054	-	-	-	...	-
Uncovered	506	447	5,054	-	-	-	...	-
Recreation	4,443	-	-	-	3,853	-	...	-
Uncovered	1,443	-	-	-	3,853	-	...	-
Water management	264	330	1,327	1,329	1,331	1,334	...	5,518
Uncovered	264	330	1,327	1,329	1,331	1,334	...	5,518

⁸⁵ Andersson Elffers Felix (2024).

⁸⁶ Netherlands Airport Consultants (2022).

Full baseline analysis

Investment costs	2025	2026	2027	2028	2029	2030	...	2050
Roads, parking, public transport	6,772	2,370	2,566	12,838	2,192	2,192	...	4,494
Uncovered	2,432	2,141	2,541	12,838	2,192	2,192	...	4,494
Harbor	26,901	56,972	-	-	-	-	...	-
Uncovered	129	1,000	-	-	-	-	...	-
Total	46,290	76,720	17,265	22,436	8,016	3,816	...	10,501
Uncovered	6,189	10,966	17,240	22,436	8,016	3,816	...	10,501

Table focuses on the estimated costs of only investments, not including the resulting depreciation and maintenance costs in the reports. * Uncovered investments in infrastructure. Source: Economic Bureau Amsterdam (2026) based on AEF.

- (Overdue) maintenance needs:** According to the AEF report on the financial challenges of physical infrastructure in the Caribbean Netherlands, part of Saba requires upgrades or (overdue) maintenance. Saba owns, relative to Sint Eustatius and Bonaire, many buildings that all require regular upkeep. Costs are high due to overdue maintenance on some buildings, the need for more frequent upkeep because of the local climate, and higher expenses resulting from importing all the materials. Roads also face challenges, with repairs made more expensive due to the island's altitudes, vulnerability to erosion, and heavy rainfall. Maintaining the harbor is relatively costly, and the expense would increase further with the second harbor being constructed. Total cost for maintenance and depreciation on Saba is estimated at approximately 10 million dollars per year between 2025 and 2050. During this period, the costs are projected to rise from 5.3 million dollars in 2025, stabilizing around 2040, and reaching an estimated 16.3 million dollars by 2050.

Investments gaps and limited local capacity create uncertainty around the implementation of infrastructure projects

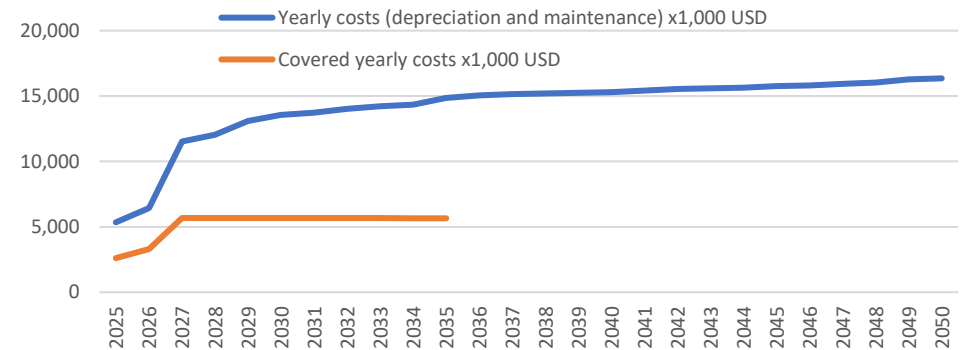
- No financial coverage for all investments:** Not all required investments are currently covered in the government budget. The largest uncovered

⁸⁷ Andersson Elffers Felix (2024).

obligations are related to the harbor, airport, and road infrastructure. Maintenance costs for both the new and existing harbor exceed projected revenues, and additional projects, such as invasive species control, currently lack funding. Several airport assets require replacement or renovation, and parts of the harbor road remain unfunded with inadequate maintenance budgets. Furthermore, there is no financial coverage yet for the required investments by utility companies, with uncovered costs estimated at 84 million dollars between 2025 and 2050, according to AEF.

- Limited implementation capacity:** It remains uncertain whether the estimated investments can be fully realized in practice, given the limited capacity of the public body and local contractors. AEF therefore developed a balanced scenario in which investment costs are distributed more evenly over time.

Figure 16: Costs of depreciation and maintenance are estimated to rise to over 16 million per year in 2050, of which only a share is covered.



Source: Economic Bureau Amsterdam (2026) based on AEF⁸⁷.

Full baseline analysis

Build of the Black Rocks harbor gives economic benefits, but carries ecological risks

- **New harbor built at Black Rocks:** A new harbor is planned to improve Saba's accessibility and support economic development, as the existing Fort Bay Harbor requires reconstruction following hurricane damage. Assessments of EcoVision⁸⁸ indicate that hurricane wave impacts could be severe, prompting the selection of Black Rocks as an alternative site. The construction contract was signed in October 2024, with completion expected by December 2026.⁸⁹
- **Positive economic impacts expected:** The Black Rocks Harbor project is anticipated to generate both direct and indirect economic benefits, estimated at a 17 million dollars increase to GDP and 103 FTE jobs during construction. Once operational, the harbor is expected to contribute 401,000 dollars to GDP annually, 196,000 dollars in labor income, and support 7 FTE jobs.⁹⁰ The harbor also offers opportunities to expand yachting tourism, while Fort Bay harbor can serve as a cargo harbor, enabling increased trade opportunities through greater cargo capacity. However, Fort Bay harbor will still not be able to accommodate larger vessels, which might continue to limit its capacity after the upgrades.
- **Broader socioeconomic impacts:** Potential socioeconomic impacts include increased trade opportunities due to increased cargo capacity, improved visitor experiences, attract follow-on investment, and support for the construction industry, as described by Ernst & Young.
- **Significant environmental risks:** While Black Rocks offers better hurricane resilience, it carries significant ecological risks, including habitat loss for endangered species, coral disturbance, and erosion, assessed by EcoVision. Mitigation measures such as caisson breakwaters, slope stabilization, monitoring, and ecological compensation are recommended to reduce impacts.

Improvements are needed in the digital infrastructure

- **Poor price-quality ratio of internet and mobile services:** Internet speeds remain low on Saba and costs high. Recommended actions include completing fiber connections, improving price-quality ratios, and continuing mobile network investments to handle future growth in data traffic.⁹¹

Labor and income

Saba's labor market is characterized by a high share of public-sector employment, particularly in public administration and services, education (only partly public), and health, which together account for over 60 percent of all jobs. Private-sector employment is concentrated in education (the Saba Medical School), trade, construction, culture, and accommodation and food serving. The labor market is tight, with low unemployment, rising wages, and growing reliance on migration to fill skill gaps, especially in care and education. Average incomes have risen, particularly in public administration and services. Residents report moderate satisfaction with their financial situation.

⁸⁸ EcoVision (2022).

⁸⁹ Ballast Nedam (2024).

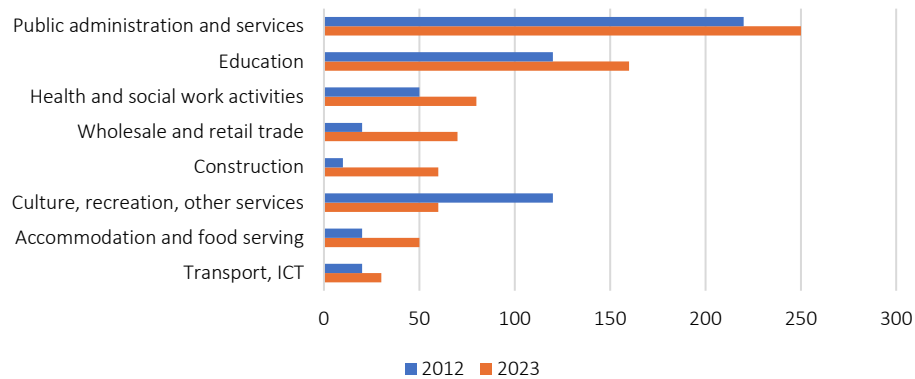
⁹⁰ Ernst & Young (2024).

⁹¹ Economisch Bureau Amsterdam (2023).

Full baseline analysis

Public administration and services, education, and health provide the most jobs on Saba

Figure 17: Public administration and services, education and health provide over half of the jobs on Saba.



Source: Economic Bureau Amsterdam (2026) based on CBS⁹².

- High public sector employment:** In 2023, 61 percent of Saba’s employed labor force worked in public administration and services, education or health and social care, up from 60 percent in 2012. Public administration and services alone provided 250 jobs in 2023. A large public sector share is typical for a small island economy, which faces disadvantages of scale: a minimum public workforce is required to provide the essential services.⁹³ The education sector is partly public and partly private; the private Saba Medical School is included in these figures, which leads to an overestimation of the public sector. The Saba Medical School is an important job provider on the island, but no exact numbers of the employment generated by the school are available.

⁹² CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

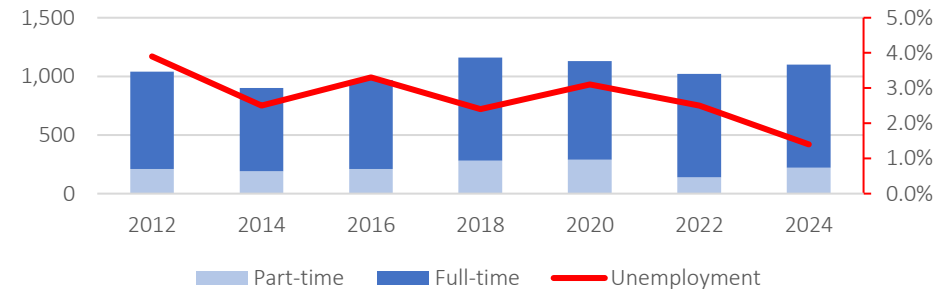
⁹³ Van Berkel & Van Vuuren (2025).

- Growth in construction and trade:** Within the private sector, the largest employers are construction and trade, each providing approximately 70 jobs. Employment in these sectors grew significantly between 2012 and 2023. In contrast, the culture, recreation and other services sector experienced a sharp decline, dropping from 120 to 60 jobs during the same period.

Labor market is tight; migration is essential to help fill (skill) gaps

- Unemployment decreased:** The employed labor force, defined as people aged 15 to 75 with full-time or part-time jobs, has fluctuated between 2012 to 2022, reaching 1,120 in 2024, which is slightly higher than 1,080 in 2012. Most workers are employed full-time. The unemployment rate has decreased from 4 to 1 percent over the same period.

Figure 18: The employed labor force increased from 2012 to 2022; unemployment rate has decreased.



Source: Economic Bureau Amsterdam (2026) based on CBS⁹⁴.

Migration can temporarily solve shortages in the labor market

- Migration fills labor gaps:** According to the State Commission, migration plays a key role in addressing labor shortages, both in numbers and skills.

⁹⁴ CBS StatLine. Caribisch Nederland; arbeidsdeelname, kerncijfers.

Full baseline analysis

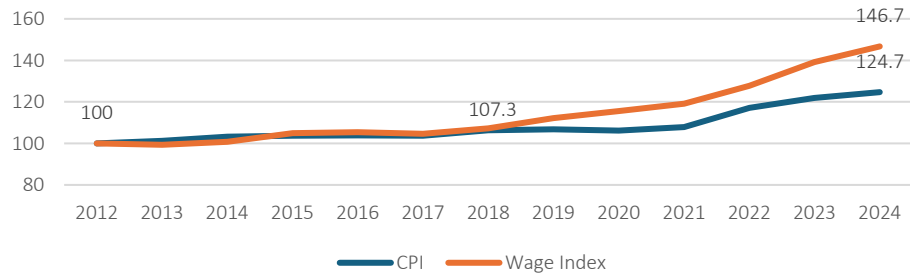
Labor market tightness is intensified by an aging population and the continued outflow of young people. The role of migration is particularly evident at the Saba Medical School, where many staff are recruited from the US or Canada. Efforts to attract migrant workers are constrained by the lengthy work permit process. With an aging population, demand for care workers is expected to increase. Also in education, even small staff changes can affect the continuity of services on the island, making the working-age population increasingly reliant on labor migration.⁹⁵

- **Migration approach should prioritize broad prosperity:** The State Commission recommends a migration policy that prioritizes the islands' broad welfare needs and focuses on the care, education and food supply sectors. Moreover, to encourage young people to return, development and training opportunities should be improved.

- **Wages have increased more than prices since 2018:** Since 2018, wages have grown faster than prices, strengthening the real purchasing power. The wage index increased 36.7 percent, compared to a 17.2 percent rise in the Consumer Price Index (CPI), which measures average prices paid by households for goods and services.
- **High cost of living on Saba:** Prices on Saba exceed those on Sint Maarten, St. Eustatius and Bonaire. Between 2010 and 2023, overall prices on Saba increased by 34.5 percent, with food prices rising even more sharply by 52.5 percent. Many of the underlying causes are external and difficult to address, including the island's small scale, mountainous terrain, remoteness from major markets, high wages and limited port capacity. The largest components of prices on Saba are the price in the US and the retail margin on Saba.⁹⁷

Wages have risen faster than prices

Figure 19: Wage index rose faster than Consumer Price Index from 2012 to 2024.



Source: Economic Bureau Amsterdam (2026) based on CBS⁹⁶.

⁹⁵ State Commission Demographic Developments Caribbean Netherlands 2050 (2024).

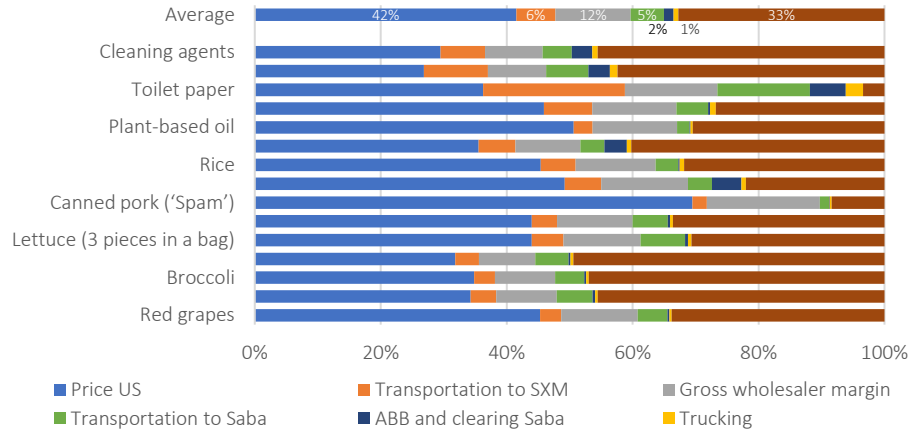
⁹⁶ CBS StatLine. Caribisch Nederland; consumentenprijsindex (CPI) 2017=100.

CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

⁹⁷ Economisch Bureau Amsterdam (2024).

Full baseline analysis

Figure 20: The largest components of prices on Saba are the price in the US and the retail margin on Saba. Percentages do not add up to 100 percent due to rounding differences.



Source: Economic Bureau Amsterdam (2024)⁹⁸.

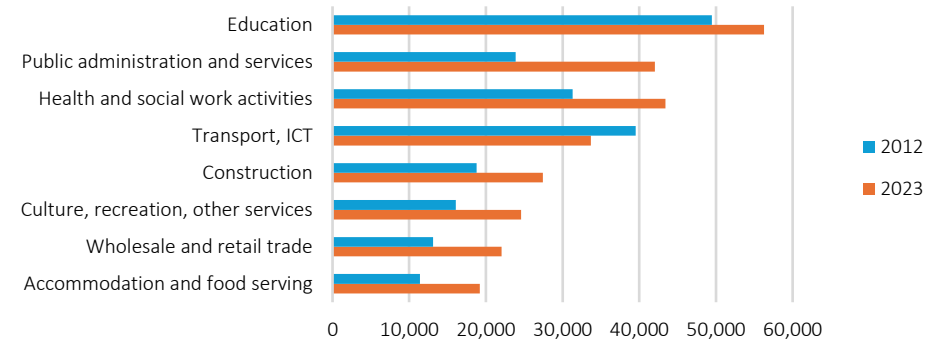
Yearly income rose strongest in public administration jobs

- **Steepest income rise in public administration and services:** In all major sectors, incomes rose in 2023 compared to 2012, except for transport and ICT. The steepest income growth occurred in public administration and services, where the average annual income increased by 76 percent to 42,020 dollars in 2023.
- **Education is the highest paying sector:** With an average annual income of 56,280 dollars, the education sector offers the highest wages.

⁹⁸ Economisch Bureau Amsterdam (2024).

⁹⁹ CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

Figure 21: Average yearly income highest in education sector, strong rise in public administration and services.



Source: Economic Bureau Amsterdam (2026) based on CBS⁹⁹.

The high minimum wage puts pressure on the island's international competitiveness

- **Highest minimum wage in the Caribbean region:** The minimum wage in the Caribbean Netherlands is among the highest in the region. While this higher minimum wage raises income levels, it also increases the costs in the tourism sector, an area where the Caribbean Netherlands competes with other islands in the region. Improving socioeconomic conditions therefore requires a balanced approach: higher wages alone may undermine long-term economic opportunities. To achieve sustainable improvements, it is essential to reduce the cost of living.¹⁰⁰
- **Fiscal policy alone is insufficient:** The Minimum Income Standard Committee stresses the need for a fundamental shift in governance, treating the BES islands as full part of the Kingdom. Coordinated action is needed across energy, telecommunication, taxation, competition, policy, trade and sea

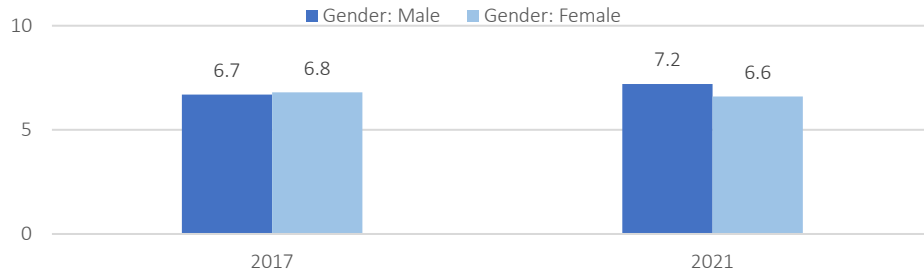
¹⁰⁰ Van Buijten (2025).

Full baseline analysis

and air transport. An integrated approach is essential, ensuring the central government in the Hague and the islands work in close alignment.

Saban residents are moderately satisfied with their financial situation

Figure 22: Residents of Saba rate their financial situation at 7.2 (Male) and 6.6 (Female) in 2021.



Source: Economic Bureau Amsterdam (2026) based on CBS¹⁰¹.

- **Satisfactory financial situation:** On average, residents of Saba are moderately satisfied with their financial situation, rating it 6.9 on a 0-10 scale in 2021, up from 6.7 in 2017.
- **Gender differences in trends:** Between 2017 to 2021, men’s satisfaction increased from 6.7 to 7.2 while women’s satisfaction slightly decreased from 6.8 to 6.6.

Education

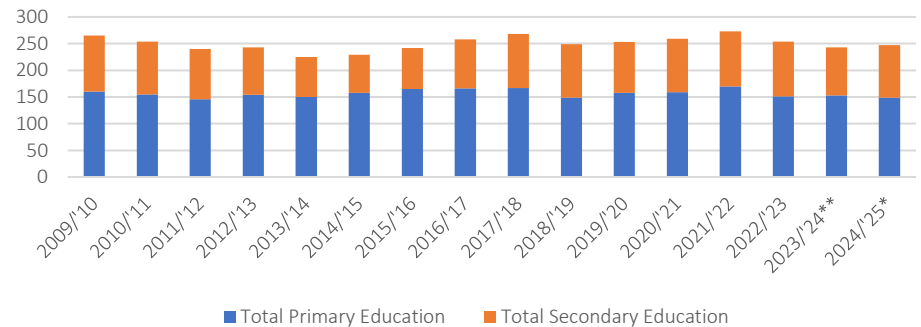
Education is a key part of Saba’s economy, with the Saba Medical School attracting international students and staff. Primary and secondary enrollment is stable, and

more residents now complete secondary education. Plans aim to attract new institutions in agriculture, nature, and sustainability.

The education sector is a large contributor to the Saban economy

- **Primary, secondary and higher education offered:** Saba currently offers primary, secondary, and higher education. Higher education is provided by the private Saba Medical School. Education accounts for a large share of jobs, and in particular the Saba Medical School plays an important role in the economy, bringing in students and researchers from around the world.¹⁰²
- **Stable number of students in primary and secondary education:** The total number of students remained stable, reaching 247 students in the 2024/2025 school year, of which 149 are in primary school and 98 in secondary education.

Figure 23: The total number of students in primary and secondary education on Saba remained stable from 2009 to 2025.



Source: Economic Bureau Amsterdam (2026) based on CBS¹⁰³.

¹⁰¹ CBS StatLine. Caribisch Nederland; welzijn, persoonskenmerken.

¹⁰² State Commission Demographic Developments Caribbean Netherlands 2050 (2024). Girardi & Patrahau (2024).

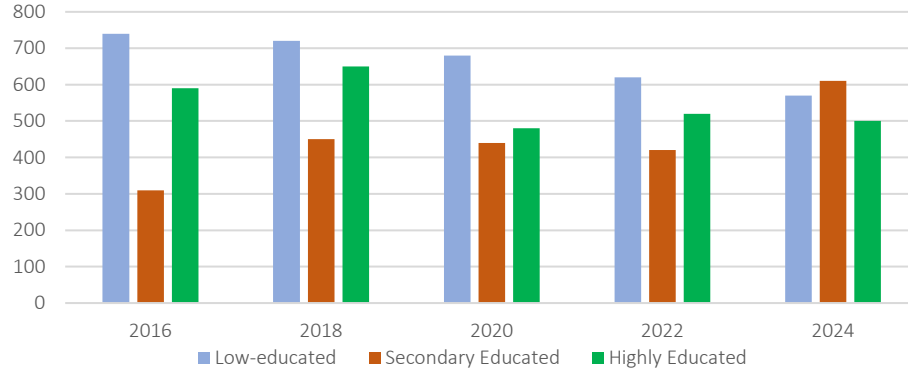
¹⁰³ CBS StatLine. Caribisch NL; leerlingen en studenten in po, vo en mbo.

Full baseline analysis

- **Challenges in quality of schools:** Saba’s primary school did not meet basic quality standards in 2023–2024. In addition, the boards showed significant challenges in internal supervision and overall quality management.¹⁰⁴
- **Attracting new educational institutions:** The Ministry of the Interior and Kingdom Relations of Netherlands¹⁰⁵ suggests a medium- to long term plan to attract new educational institutions. Partnerships could be established with institutions focused on agriculture, nature, and sustainability, supporting local talent development on an important topic for Saba and contributing to its social and economic development.

The share of people with secondary education as highest level has grown

Figure 24: The total number of students on Saba remained stable from 2009 to 2025.



Source: Economic Bureau Amsterdam (2026) based on CBS¹⁰⁶.

- **Shift towards more residents completing secondary education:** In 2024, most residents aged 15 years and older on Saba have secondary education as their highest level of education completed, while slightly smaller shares

have either low or higher education as their highest level. Between 2016 to 2024, notable changes in educational attainment occurred: the number of people with low education and those with higher education also declined. In contrast, the middle group increased substantially.

- **Most people speak English:** Most of the Saban population (98 percent) speaks English. Other languages are spoken to a lesser extent: Dutch (33 percent), Spanish (32 percent) and Papiamento (12 percent).¹⁰⁷

The Saba Medical School has experienced declining student numbers

- **Decreasing number of students:** Overall enrollment has been declining, while exact numbers are missing. The Medical School identifies two main reasons behind this decrease. First, post-COVID effects are continuing, as fewer US/Canadian students are traveling abroad and online education has been more common. Second, regulatory changes in the US lead to the rise of more American medical schools, which resulted in higher competition for Caribbean medical schools.
- **Growth potential limited:** Expansion to previous higher student numbers is currently not possible due to insufficient housing on the island, as highlighted by the Medical School.

Culture and identity

Based on the available data, two notable developments emerge. First, Roman Catholicism is the largest and growing religious denomination on Saba, now representing half of the population. Second, the island is experiencing an increase in unmarried individuals.

¹⁰⁴ Inspectorate of Education (2025).

¹⁰⁵ Ministry of the Interior and Kingdom Relations of Netherlands (2023).

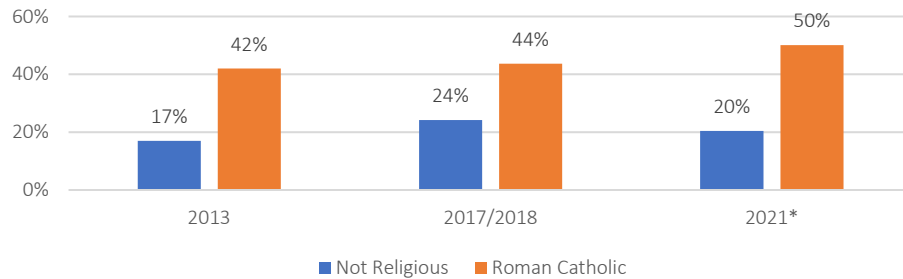
¹⁰⁶ CBS StatLine. Caribisch Nederland; bevolking hoogstbehaald onderwijsniveau en -richting.

¹⁰⁷ CBS StatLine. Caribisch Nederland; gesproken talen en voertaal, persoonskenmerken.

Full baseline analysis

Roman Catholic is the largest denomination on Saba, now representing about half of the population

Figure 25: The share of Roman Catholics on Saba has increased by 8 percentage points.



Source: Economic Bureau Amsterdam (2026) based on CBS¹⁰⁸.

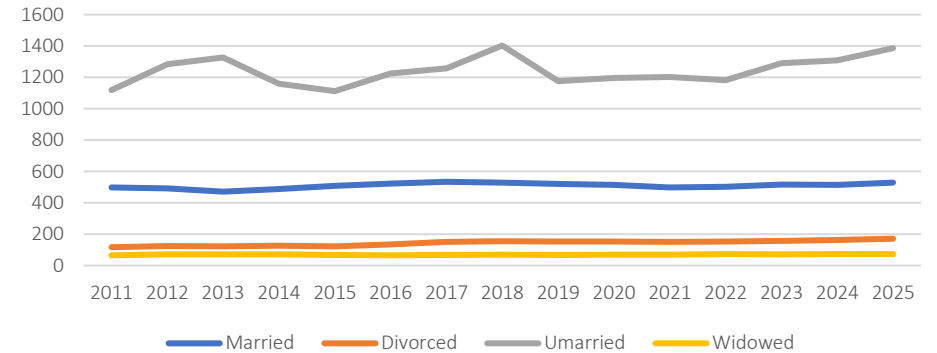
- Largest and growing share of Roman Catholics:** On Saba, 50 percent of the population is now Roman Catholic. This share has grown from 42 percent in 2013. 20 percent report no religion (up from 17 percent in 2013), and the remainder belong to smaller denominations such as Pentecostal, Protestant Adventist, Evangelical, and Anglican.

A large and growing part of the population is unmarried

- Increasing number of unmarried individuals:** The proportion of unmarried individuals, the largest segment of the Saban population, has increased between 2011 and 2025. In contrast, the married and widowed populations remained relatively stable over the period.

¹⁰⁸ CBS StatLine. Caribisch Nederland; kerkelijke gezindte, persoonskenmerken.

Figure 26: A large and growing part of the Saban population is unmarried.



Source: Economic Bureau Amsterdam (2026) based on CBS¹⁰⁹.

Environment and resources

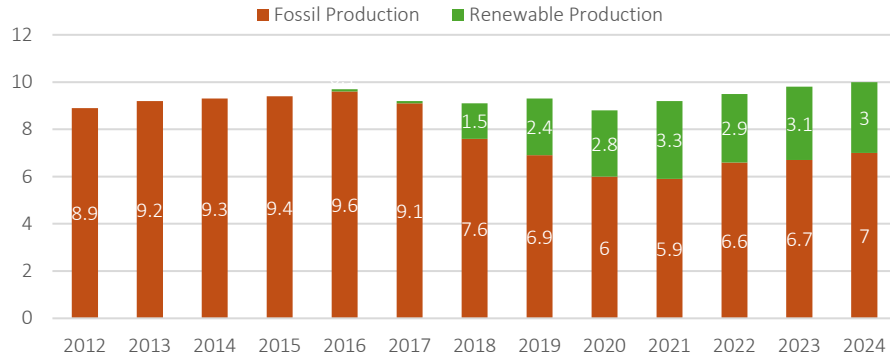
Saba's natural environment is under threat, with consequences for both ecology and the economy. Some threats to nature are caused locally, such as free-roaming live-stock and invasive species. Other threats, such as global warming, are outside of the island's control, but will have far reaching consequences for nature and the inhabitants of Saba. The island currently addresses climate- and nature-related challenges in part by investing in solar energy production and improving their self-sufficiency.

¹⁰⁹ CBS StatLine. Caribisch Nederland; overledenen, geslacht, leeftijd en burgerlijke staat.

Full baseline analysis

Slight increase in total energy production, with a strong rise in renewable share

Figure 27: The share of renewable energy in the energy mix (total kWh) has increased from zero to one third since 2016.



Source: Economic Bureau Amsterdam (2026) based on CBS¹¹⁰.

- **Total electricity production increased:** The total production of electricity on Saba increased from 8.9 million kWh in 2012 to 10 million kWh in 2024.
- **Renewable energy production is gaining ground:** With EU support, Saba is expanding wind and solar capacity, aiming for climate-neutral energy production by 2030.¹¹¹ Since 2018, two solar parks with battery storage allow the island to run on solar power for 8-10 hours a day under optimal conditions.¹¹² The investments in renewable energy are reflected in the data: in 2024, 30 percent of Saba’s total electricity production (3 million kWh) comes from renewable sources.

¹¹⁰ CBS StatLine. Caribisch Nederland; aansluitingen en productie van elektriciteit en water.

¹¹¹ Girardi & Patrahau (2024).

¹¹² International Panel on Deltas and Coastal Areas (2024).

Saba’s natural environment is under threat, bringing both ecological and economic consequences

- **Current conservation status is unfavorable:** Biodiversity on Saba faces considerable challenges. Its overall conservation status is assessed as “moderately unfavorable” to “very unfavorable”. Key pressures include free-roaming livestock, invasive species, and the impacts of climate change. According to a report by the Dutch Caribbean Nature Alliance (DCNA), many of Saba’s ecosystems, including coral reefs, mangroves, seagrass meadows, tropical forests, and caves, are showing signs of deterioration.¹¹³ For instance, coral cover on Saba has rapidly declined from 24 to 2 percent in the last 25 years, mostly due to erosion-driven runoff and coral bleaching.¹¹⁴
- **Nature holds substantial economic and ecological importance:** The natural environment has substantial economic value, estimated at 28.4 million dollars, with nearly a third (27 percent) derived from nature-based tourism. Healthy ecosystems are therefore not only vital for biodiversity but also support local economic activity. Moreover, degradation of habitats like coral reefs, mangroves, and forests reduces protection against extreme weather events. Fisheries near Saba are in relatively good condition, although the Saba Bank is considered moderately unfavorable, according to the DCNA.
- **Vulnerability to climate change:** Saba is highly vulnerable to climate change due to its small size, fragile ecosystems, and reliance on imports and tourism. Key challenges include decreasing rainfall threatening freshwater supplies, rising temperatures increasing electricity demand and health risks, ocean warming and acidification causing coral bleaching, and stronger hurricanes threatening lives, infrastructure, and the economy.¹¹⁵
- **Current climate adaptation efforts:** Currently, Saba is taking several climate adaptation efforts, such as improving self-sufficiency with rainwater catchment, a reverse osmosis plant and a water bottling plant. Moreover, a goat

¹¹³ Dutch Caribbean Nature Alliance (2020).

¹¹⁴ Wageningen University & Research (2025).

¹¹⁵ International Panel on Deltas and Coastal Areas (2024).

Full baseline analysis

control program is introduced and solar energy is expanded. Furthermore, in the Saba Package Agreement, Saba commits to coral restoration, waste and wastewater management, further invasive species control, and the promotion of local food production.

Protecting Saba's nature requires integrated actions to restore habitats, build resilience, and ensure sustainable use of natural resources.

- **Ensure sustainable use of water and land:** As one of the strategies objectives in the Nature and Environment Policy Plan (NEPP), sustainable practices should be promoted through responsible fisheries, the tourism industry maintained in balance with nature, and sustainable food production supported for long-term resource management.¹¹⁶
- **Improve waste and wastewater management:** The DCNA recommends enhancing the management of solid waste and wastewater management to reduce environmental pollution and eutrophication, which harms ecosystems and human uses of water.
- **Protect marine and terrestrial ecosystems:** In the NEPP, strategic objectives focus on controlling erosion and runoff, improving waste and water management, restoring coral reefs, conserving key habitats and species, and preventing invasive species.
- **Strengthen ecosystem resilience:** Strengthening ecosystem resilience is essential for enhancing Saba's ability to withstand and recover from climate-related stresses, such as coral bleaching, prolonged droughts, and stronger hurricanes. The DCNA proposes measures including improving coastal protection through spatial planning, ensuring that, for example, natural shorelines act as buffers against storm impacts. In addition, reforestation with native species helps stabilize soils and reduce erosion.

- **Improve monitoring and management:** Establishing systematic environmental monitoring helps track the ecosystem health and evaluate the effectiveness of management strategies, according to the DCNA.
- **Promote collaborative management:** Local and national governments should collaborate with experts to develop integrated solutions for reversing biodiversity loss. Investments in nature are essential for Saba's ecological and economic future, according to the DCNA.
- **Strengthen local capacity and awareness:** Environmental awareness is raised through education and training, employment opportunities are created through nature-based investments, and a structural research agenda can help guide conservation efforts, as outlined in the NEPP.

Health and safety

Obesity remains a major public health concern, with 39% of residents severely overweight, and overall perceived health has declined since 2013. At the same time, smoking and heavy drinking have decreased. Saba maintains a high sense of safety, with over 90% of residents reporting that they never feel unsafe.

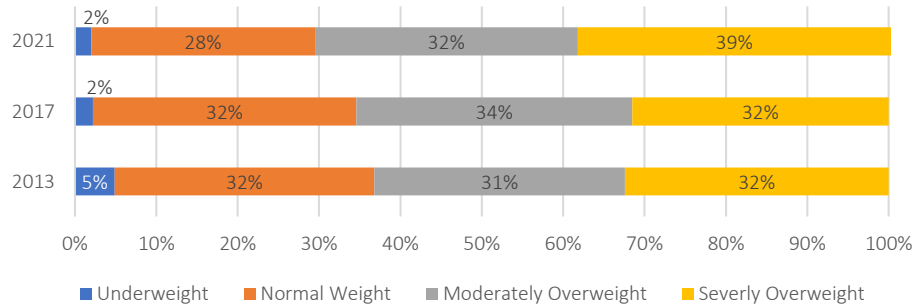
The number of heavy smokers and drinkers decreased, while obesity remains a threat to public health

- **Prevalence of overweight:** In 2021, 71 percent of the population was overweight, including 32 percent moderately overweight and 39 percent severely overweight. The share of severely overweight individuals has increased since 2013, when it was 32 percent.

¹¹⁶ Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020).

Full baseline analysis

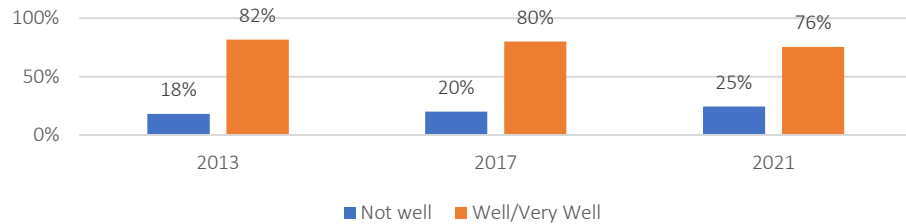
Figure 28: 39 percent of the population is severely overweight in 2021.



Source: Economic Bureau Amsterdam (2026) based on CBS¹¹⁷.

- Perceived health has declined:** The percentage of people rating their health as very good or good decreased from 82 in 2013 to 76 percent in 2021, while those reporting less-than-good health rose from 18 to 25 percent. This trend aligns with the increase in obesity.

Figure 29: Perceived health of Sabans has declined since 2013.



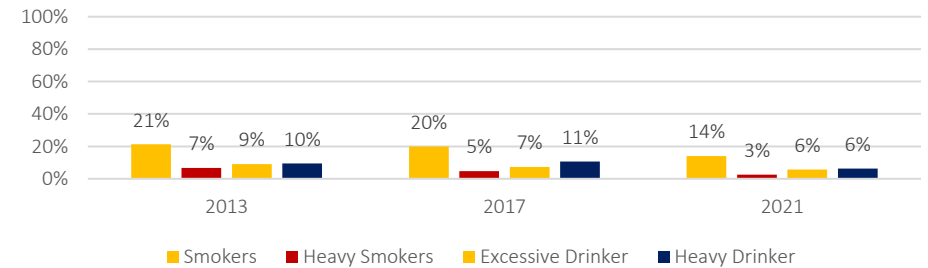
Source: Economic Bureau Amsterdam (2026) based on CBS¹¹⁸.

¹¹⁷ CBS StatLine. Caribisch NL: leefstijl; persoonskenmerken.

¹¹⁸ CBS StatLine. Caribisch NL: gezondheid en aandoeningen; persoonskenmerken.

- Improved lifestyle indicators:** Smoking declined from 21 percent in 2013 to 14 percent in 2021, while heavy drinking decreased from 10 percent to 6 percent. The limited available data does not allow conclusions on drug use. The Saba Package Agreement includes a plan to establish a multi-disciplinary task force to develop an action plan addressing alcohol and tobacco abuse.

Figure 30: Heavy smoking and drinking decreased on Saba between 2013 and 2021.



Source: Economic Bureau Amsterdam (2026) based on CBS¹¹⁹.

Sabans experience a high sense of safety

- High sense of safety:** In 2017, 92 percent of residents never felt unsafe, 4 percent felt unsafe at times. By 2021, the sense of safety improved slightly; 94 percent never felt unsafe and 3 percent felt unsafe occasionally.¹²⁰

Benchmark analysis

In the benchmark analysis, Saba's economy and social characteristics are compared to those of other islands in the region, with special emphasis on the islands in the Dutch Kingdom. Additionally, it gives an overview of other islands in the region that

¹¹⁹ CBS StatLine. Caribisch NL: leefstijl; persoonskenmerken.

¹²⁰ CBS StatLine. Caribisch Nederland; (on)veiligheidsbeleving, persoonskenmerken.

Full baseline analysis

developed a socio-economic development strategy, as this might yield insights that can also be applied to Saba.

Saba, the smallest island in the Kingdom of the Netherlands, has modest population growth and a moderate per capita GDP growth compared to other islands

Table 5. Saba has modest population growth, a low GDP per capita, moderate per capita GDP growth, comparable age dependency, and low unemployment.

	Saba	St. Eustatius	Bonaire	Aruba	Curaçao	St Maarten
Population (2024)	2,060	3,204	25,133	107,624	155,900	43,350
Population growth 2011-2024	15%	-11%	60%	5%	3%	27%
Real GDP per capita (2022, US dollars)	25,641	27,452	29,327	30,560	20,502	36,477
Real GDP per capita growth (2013-2022)	-1%	-21%	3%	11%	-14%	-16%
Old age dependency ratio *	22%	21%	20%	26%	25%	20%
Unemployment rate (2024)	1.4%	4.4%	2.1%	3.9%	6.9%	8.5%
Tourism arrivals, x1,000 (2023) **	5.7	5.8	171	806.5***	582.4	368.2
Tourism per capita	2.8	1.8	7.1	7.5	3.7	8.6
Gini index	0.35	0.40	0.39	N.a.	N.a.	N.a.

*Number of seniors relative to the number of working-age people. **Incoming tourism by plane for Saba, Sint Eustatius, Bonaire; stayover visitors for Aruba, Curaçao, Sint Maarten. ***Aruba's number is 2021. Source: Economic Bureau Amsterdam based on several sources¹²¹

- **Smallest population:** Saba's population is the smallest in the Kingdom with 2,060 inhabitants, but still comparable to the population of Sint Eustatius (3,204). Saba's population increased by 15 percent since 2011, which is faster than most other islands, but slower than Bonaire and Sint Maarten.
- **Low GDP per capita:** Saba's GDP per capita is relatively low compared to the other islands, particularly Sint Maarten and Aruba. The differences within the BES islands are less pronounced.
- **Middle range in economic growth:** Per capita economic growth varies significantly across the islands. With a 1 percent per capita decline from 2013 to 2022, Saba ranks in the middle compared to the others. In general, economic stagnation in the Caribbean stems from structural factors such as public debt, structural trade deficits, vulnerability to natural disasters, small open economies dependent on foreign trade, low competitiveness due to high costs, a rigid labor market, overregulation, and restricted access to finance and development aid due to the middle-income trap. Additional constraints include high transport and connectivity costs, limited implementation capacity, and reliance on external funding.¹²²
- **Comparable age dependency:** With 22 people aged 65+ for every 100 people of working age in 2024, Saba's age dependency ratio is comparable to other islands in the Kingdom.
- **Low unemployment:** Saba's unemployment is at 1.4 percent, the lowest in the Kingdom. Sint Maarten has the highest unemployment (8.5 percent).
- **Lower tourism numbers compared to the other islands:** Tourism accounts for a significant share of GDP on all the Kingdom's islands. In 2024, tourism

¹²¹ Caribbean Analytics & Statistics data tool (2025), World Bank (n.d.), CBS StatLine. Caribisch NL: inkomend toerisme per vliegtuig and CBS StatLine. Caribisch NL; inkomensongelijkheid bij particuliere huishoudens, CBS Curaçao (n.d.), CBS Aruba (n.d.), and and Department of Statistics St. Maarten (n.d.).

¹²² Economisch Bureau Amsterdam (2020).

Full baseline analysis

represented 85 percent of GDP in Sint Maarten, 72 percent in Aruba, 38 percent in Curaçao. For Saba, this is approximately 7 percent.¹²³

- **Similar income inequality:** Saba shows the lowest Gini index among the BES islands at 0.35, which is close to 0.39 on Bonaire and 0.40 on Sint Eustatius.

The smaller Caribbean economies of St. Kitts and Nevis, St. Barthélemy, Montserrat, and Anguilla are all heavily dependent on tourism

Table 6: Saba has a small economy with low real GDP and low real GDP growth rate, both overall and per capita, compared to other Caribbean islands, based on 2022–2023 data.

	Saba	St Kitts & Nevis	St Barth	Montserrat	Anguilla
Size (km ²)	13	260	21	105	90
Population (2024)	2,060	46,843	10,500	4,399	12,025
Real GDP (2023), in millions \$*	42	1,040	-	-	362
Real GDP growth rate	1.50%	2.30%	-	7.29%	2.47%
	(2022)	(2023)	-	(2023)	(2023)
Real GDP growth rate per capita	1.87%	2.20% (2023)	-	8.09%	0.83%
	(2022)		-	(2023)	(2023)
Population over 65-years of age	21.0%	-	16.8%	26.6%	-

*Saba's real GDP (2022) is expressed in constant 2017 US dollars, while St Kitts and Nevis and Anguilla (2023) are expressed in constant 2015 US dollars. Source: Economic Bureau Amsterdam based on several sources.¹²⁴

- **St Kitts and Nevis:** St. Kitts and Nevis is an independent country. Tourism is the main economic driver, contributing significantly to GDP, foreign exchange earnings, and employment.¹²⁵ The islands attract growing numbers

of stay-over visitors, supported by luxury resorts. The agricultural sector is small, but an important source of income. The government promotes agricultural diversification and investment to reduce food imports and link farming with tourism. Other key sectors include financial services, light manufacturing (8–10 percent of GDP), forestry, international education, and renewable energy, including the development of a geothermal plant, which is now in its preparation phase.¹²⁶

- **St. Barthélemy:** The economy of Saint-Barthélemy, an overseas territory of the French Republic, is primarily driven by high-end tourism and duty-free luxury commerce, catering mostly to visitors from North America.¹²⁷ Construction and public services receive investments to support the tourism infrastructure. Tourism generates strong employment demand, also drawing workers from Brazil and Portugal.
- **Montserrat:** Montserrat is a British Overseas Territory. Tourism plays a key role in the economy.¹²⁸ The island is still recovering from the 1995 volcanic eruption, which displaced most residents and destroyed much of its infrastructure.¹²⁹
- **Anguilla:** Anguilla is a British Overseas Territory. Tourism is the main driver of the economy. Most visitors come from the United States and about half of the tourists are day visitors. Tourism growth in 2022 also boosted other sectors: transport, storage, and communications grew by 34%, real estate and business services by 10%, and wholesale and retail by 16%. Construction increased by 6%, supported by tourism-related projects and private housing.¹³⁰

¹²³ This number is estimated based on the sectoral shares of wages and employment in accommodation and food serving, as well as culture, recreation, and other services, based on CBS StatLine. Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008).

¹²⁴ Caribbean Analytics & Statistics, data tool (2025), Institut D'Émission des Départements d'Outre-Mer (2024), Bird (2025), Montserrat Tourism Division (n.d.), UNCTAD (2025), CBS StatLine. Caribisch Nederland; bevolking, geboorteland, nationaliteit., Statistics Department Montserrat (2025).

¹²⁵ Caribbean Regional Climate Centre (2015).

¹²⁶ The Government of St. Kitts and Nevis. (n.d.).

¹²⁷ Institut D'Émission des Départements d'Outre-Mer (2024).

¹²⁸ Statistics Department Montserrat (2025).

¹²⁹ Garcia (2025).

¹³⁰ Caribbean Development bank (n.d.). Anguilla Economic Brief 2022.

Full baseline analysis

Environmental sustainability, economic diversification, private sector innovation, digitalization, and social cohesion are key in regional development strategies

Development strategies of countries in the region can provide guidance for shaping Saba's socio-economic development strategy. Key insights from the economic visions of Dominica¹³¹, Barbados¹³², and Bonaire¹³³, are outlined below.

- **Sustainability and resilience:** All islands integrate environmental protection, climate resilience, and renewable energy into their strategies. For example, Dominica is transitioning to geothermal energy and aiming for ecotourism, Barbados is investing in renewable energy and climate resilience, and Bonaire puts nature at the core of its economic strategy, aiming at nature-based tourism and the blue economy.
- **Diversification:** Economies are reducing reliance on single sectors like tourism or agriculture. Barbados, for instance, is developing niche sectors and professional services to support a knowledge-based economy that is less reliant on traditional industries.
- **Human capital, innovation and entrepreneurship:** Skills development and private sector innovation enhance competitiveness. For example, Barbados emphasizes STEM education, workforce development, and improving the ease of doing business to attract both domestic and foreign investment.
- **Digitalization:** To foster digitalization and private sector innovation by improving access to digital tools, Dominica implements its National Digital Transformation Strategy. Barbados also promotes adopting digital technologies to enhance productivity and foster private sector led growth.
- **Social inclusion:** Ensuring equitable access to opportunities, healthcare, and protection to vulnerable groups is a common theme. In Barbados, social security reforms address an aging population.

¹³¹ International Monetary Fund (2025).

¹³² Prime Minister's Office, Barbados (2024).

¹³³ Commissie Integrale Sociaal-Economische Aanpak (1992).

Appendix B. List of measures



List of measures

Measure	Priority	Cost	Responsibility	Benefits	Time horizon (start implementation)	Type of action	Implementation risk
Pre-conditions							
<i>Improve connectivity</i>							
PSO air transport	Urgent	\$ 3.8 - 7.6 mln annually	Central Govt	Welfare gain and driver for growth	Short term (<2.5 years)	Legislation, policy decision, procurement procedure, funding	High
PSO ferry	Urgent	\$ 1.7 mln annually	Central Govt, PES	Welfare gain and driver for growth	Short term (<2.5 years)	Policy decision, procurement procedure, funding	Low
<i>Improve labor migration</i>							
Streamline labor migration procedures	Urgent	-	IND, Central Govt	Private sector growth, public sector capacity	Short term (<2.5 years)	Research, policy decision, legislation	Medium
Work permit exceptions	Urgent	-	PES, Central Govt	Fill critical shortages	Short term (<2.5 years)	Policy execution	Low
<i>Available and affordable housing</i>							
Continue (social) housing efforts	High	-	PES, Central Govt	Accessible housing	Short term (<2.5 years)	Policy execution	Medium
Housing vision	High	-	PES, Central Govt	Coherent, future-proof planning, accessible housing	Short term (<2.5 years)	Policy decision, research	Low
Regulate foreign property ownership	Medium	-	PES	Accessible housing	Short term (<2.5 years)	Policy decision, local legislation	Medium
<i>Timely and reliable statistical overview</i>							
Identify gaps in data	Urgent	-	PES, CBS, Central Govt	Clear data collection	Short term (<2.5 years)	Policy decision, research	Low
Establish data collection	High	-	CBS, Central Govt, PES	Better policymaking	Short term (<2.5 years)	Policy execution	Medium
<i>Implementation capacity</i>							
Strengthen public entity capacity	Urgent	-	PES, Central Govt	Better policymaking, implementation of strategy	Short term (<2.5 years)	Funding	Medium
Economics and labor market							
<i>Tourism growth in value with a focus on ecotourism</i>							
Tourism Office Budget (professionalize tourism sector)	High	- (reinvest)	PES	Sector development in line with tourism vision	Medium term (<5 years)	Funding	Medium
Increase government tourism revenue	High	- (revenue)	PES	Marketing and promotion	Medium term (<5 years)	Policy decisions	Medium
Coherent investment planning with tourism vision	High	-	PES	Reinvest in tourism/nature	Short term (<2.5 years)	Policy decision	Medium
Preserve cultural heritage	Medium	-	PES	Higher tourism value	Short term (<2.5 years)	Funding	Medium
Yachting tourism	Medium	-	PES	Economic value and broader benefits, e.g. social cohesion	Medium term (<5 years)	Funding	Medium
<i>Research-based economy</i>							
Stimulate sustainability/marine research	Medium	\$ 177,000 annually	PES, non-profits	Economic activity and diversification Nature preservation	Medium term (<5 years)	Funding	Medium

List of measures

Measure	Priority	Cost	Responsibility	Benefits	Time horizon (start implementation)	Type of action	Implementation risk
<i>Energy measures</i>							
Energy subsidy	High	\$ 676,000 annually	Central Govt, SEC	Reduce household/business costs, support wage development, broader economic spillover effects	Short term (<2.5 years)	Funding, policy decision	High
Structural financing renewable energy production	High	AEF	Central Govt, SEC	Ensure sustainable, affordable energy long-term	Medium term (<5 years)	Funding, policy decision	High
<i>Improve business environment</i>							
Structural banking solution	High	-	Central Govt PES, Central Govt, Chamber of Commerce	Stimulate businesses, wider consumer benefits	Medium term (<5 years)	Research, legislation, policy decision	High
Professionalize Chamber of Commerce	High	-	Central Govt, Chamber of Commerce	Stronger business representation and support	Short term (<2.5 years)	Funding	Low
Improve postal services	Medium	-	Central Govt	Stimulate businesses, wider consumer benefits	Short term (<2.5 years)	Funding, policy decision, procurement procedure	High
<i>Managing labor market distortions, strengthening private sector</i>							
Monitor and manage public-private wage gap	High	-	PES	Informed decision making, stronger private sector	Short term (<2.5 years)	Research	Medium
Structural dialogue public-private sector	High	-	PES, business associations	Better coordination, bottom-up approach	Short term (<2.5 years)	Policy execution	Low
Local contractors in government projects	Medium	-	PES PES, ROA CN, business associations	Stronger private sector, capacity building	Medium term (<5 years)	Policy decision	Low
Staff training private sector	Medium	-	PES, ROA CN, business associations	Stronger private sector, skilled workforce	Medium term (<5 years)	Funding	Medium
Infrastructure							
<i>Address backlogs and establish sustainable funding for physical infrastructure</i>							
Fix infrastructure backlogs	Urgent	\$ 10 mln annually	Central Govt, PES	Future-proof infrastructure	Short term (<2.5 years)	Funding	High
Assure budget infrastructure projects and improve funding structure	High	-	Central Govt, PES	Sustainable financing	Short term (<2.5 years)	Policy decision, funding	High
Assess climate resilience infrastructure	High	-	Central Govt, PES	Less future damage	Short term (<2.5 years)	Policy execution	Medium
Increase execution capacity	Urgent	-	PES, Central Govt	Ensure implementation of projects	Short term (<2.5 years)	Funding	High
<i>Improve digital connectivity</i>							
Digital connectivity	Medium	-	PES, Satel, Central gov	Full coverage	Medium term (<5 years)	Policy decision, funding	Medium
Telecom collaboration	Medium	-	Satel	Cost-efficient telecom	Medium term (<5 years)	Research	Medium
Cost of living							
<i>Targeted measures to facilitate lower transport cost and supply chain efficiency</i>							

List of measures

Measure	Priority	Cost	Responsibility	Benefits	Time horizon (start implementation)	Type of action	Implementation risk
Dry and cool storage	Urgent	\$ 2.8 mln	PES	Lower retail prices, increase food security	Short term (<2.5 years)	Policy decision, funding	Medium
ABB on transport	Medium	-	Central Govt, Sint Maarten, Central Govt	Lower retail prices	Medium term (<5 years)	Research, legislation	High
Enable cargo on ferry	Medium	-	Govt	Lower retail prices, increased competition	Medium term (<5 years)	Policy decision, legislation	Medium
Sell off-brand products	Medium	-	Retailers, PES	Lower retail prices	Medium term (<5 years)	Private sector effort	High
Lower margins basic goods	Medium	-	Retailers, PES	Lower cost of essential goods	Medium term (<5 years)	Private sector effort	High
<i>Explore direct trade routes</i>							
Government-initiated consolidated freight	Medium	-	Importers, PES	Lower transport cost	Medium term (<5 years)	Policy execution	High
Collaborate with Sint Eustatius	Medium	-	Importers, PES, Central Govt	Lower transport cost	Medium term (<5 years)	Policy execution	High
Engage Chamber of Commerce in trade	Medium	-	PES	Long-term coordination, better import practices	Medium term (<5 years)	Policy execution	Low
Demographics and health							
<i>Targeted and controlled migration</i>							
Statistical overview of labor market	High	-	PES, ROA CN, CBS	Targeted migration	Medium term (<5 years)	Policy decision, research, funding	Low
Integration policy	Medium	-	PES	Preserved identity	Medium term (<5 years)	Policy decision and execution	Medium
<i>Strengthening healthcare and elderly policy</i>							
Improve health- and elderly care	Medium	-	PES	Coherent vision	Medium term (<5 years)	Policy decision, policy execution, funding	Medium
Focus on preventive care	Medium	-	PES	Improved public health, mitigate economic impact of aging	Medium term (<5 years)	Policy execution, funding	Medium
Regional cooperation healthcare	Medium	-	PES	Ensure healthcare services and quality	Medium term (<5 years)	Policy execution	High
Education							
<i>Well-funded educational investments</i>							
Education funding level and structure	Urgent	\$ 2.6 mln annually	Central Govt	Better planning, financial stability	Short term (<2.5 years)	Policy decision, funding	High
Improve quality schools	High	-	Central Govt, school boards	Improved educational outcomes, settle environment	Short term (<2.5 years)	Funding	Medium
<i>Saba Medical School as large private sector employer</i>							
Engage the Medical School	Medium	-	PES	Better coordination	Short term (<2.5 years)	Policy decision	Low
Nature							
<i>Strengthening climate resilience</i>							
Nature conservation	High	\$ 257,000 annually	PES	Resilient ecosystems	Short term (<2.5 years)	Funding	Medium

List of measures

Measure	Priority	Cost	Responsibility	Benefits	Time horizon (start implementation)	Type of action	Implementation risk
Increase food security	Medium	\$ 3.8 mln	PES	Improve self-sufficiency and food security	Medium term (<5 years)	Funding	High
<i>Sustainable ecotourism in balance with nature</i>							
Local benefits ecotourism	High	-	PES	Strengthen local incentives nature protection	Medium term (<5 years)	Policy execution	Medium
Require nature investments by tourism business	Medium	-	Private investors facilitated by PES	Minimize ecological impact from tourism	Medium term (<5 years)	Policy decision and execution	Medium

Appendix C. References



References

Andersson Elffers Felix (2024). Klein Gebied, Grote Opgave.

Ballast Nedam (2024). *Bouwcontract voor Black Rocks Harbor op Saba*. (2024). <https://www.ballast-nedam.nl/nieuwsoverzicht/2024/bouwcontract-voor-black-rocks-harbor-op-saba>.

Behrens, C., Lenders, E., Adler, M. (2023). Impact PSO Bovenwindse Eilanden. SEO Economisch Onderzoek.

Bird, R. (2025, September 18). *Anguilla's population recorded at 12,025 in preliminary census results*. Anguilla Focus. Retrieved October 2, 2025, from <https://anguillafocus.com/anguillas-population-recorded-at-12025-in-preliminary-census-results/>.

Caribbean Analytics & Statistics (2025). Economisch Bureau Amsterdam. <https://caribbean-analytics.com/>

Caribbean Development Bank (n.d.) *Montserrat: Economic brief*. <https://www.caribank.org/publications-and-resources/resource-library/economic-reviews/country-economic-review-2022-montserrat>.

Caribbean Development Bank (n.d.) *Anguilla Economic brief*. <https://www.caribank.org/publications-and-resources/resource-library/economic-reviews/country-economic-review-2022-anguilla>.

Caribbean Regional Climate Centre (2015). Country profile: St. Kitts and Nevis. <https://rcc.cimh.edu.bb/files/2018/06/Country-Profile-St.-Kitts-and-Nevis.pdf>.

CBS (2022, September 27). Caribisch Nederland; (on)veiligheidsbeleving, persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82558NED/table?ts=1758873038495>.

CBS (2022, December 15). Caribisch NL: gezondheid en aandoeningen; persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82291NED/table?ts=1758872909455>.

CBS (2025, December 23). Caribisch Nederland; banen en lonen, economische activiteit (SBI 2008). *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82519NED/table?ts=1758871148345>.

CBS (2024, May 17). Caribisch NL: inkomend toerisme per vliegtuig. *StatLine*. Retrieved from: <https://opendata.cbs.nl/#/CBS/nl/dataset/83104NED/table>

CBS (2024, May 30). Caribisch Nederland; bevolking, geslacht, leeftijd, geboorteland; 2011-2024. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84712NED/table?ts=1758801836056>.

CBS (2024, June 28). Caribisch NL; inkomen tot ijkpunt voor sociaal minimum. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/85284NED/table?ts=1758802542013>.

CBS (2024, June 28). Caribisch NL; inkomensongelijkheid bij particuliere huishoudens. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/83552NED/table?ts=1758870029522>.

CBS (2025, January 24). Caribisch NL: leefstijl; persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82292NED/table?ts=175887277654>.

CBS (2025, October 8). Ongelijkheid in inkomen en vermogen; huishoudens. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84476NED/table?dl=2B857>.

CBS (2025, April 18). Caribisch Nederland; Luchtvaart, maandcijfers luchthavens. *StatLine*. Retrieved from <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82332NED/table?ts=1758895575701>.

CBS (2025, May 9). Caribisch NL; leerlingen en studenten in po, vo en mbo. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84732NED/table?ts=1758871541517>.

CBS (2025, May 19). Caribisch Nederland; overledenen, geslacht, leeftijd en burgerlijke staat. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/85672NED/table?ts=1758801918011>.

CBS (2025, July 7). Caribisch Nederland; arbeidsdeelname, kerncijfers. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/83165NED/table?ts=1758870831132>.

CBS (2025, July 7). Caribisch Nederland; bevolking hoogstbehaald onderwijsniveau en -richting. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/83861NED/table?ts=1758871651434>.

CBS (2025, May 19). Caribisch Nederland; bevolking, geboorteland, nationaliteit. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/85723NED/table?ts=1758791957114>.

CBS (2025, May 19). Caribisch Nederland; bevolking; geslacht, leeftijd, burgerlijke staat. *StatLine*. Retrieved from <https://opendata.cbs.nl/#/CBS/nl/dataset/83698NED/table>

CBS (2025, December 17). Caribisch Nederland; consumentenprijsindex (CPI) 2017=100. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84046NED/table?ts=1758871010859>.

CBS (2025, October 24). Caribisch Nederland; aansluitingen en productie van elektriciteit en water. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/81154ned/table?ts=1758872139550>.

CBS (2025, September 25). Caribisch Nederland; bruto binnenlands product (bbp). *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/84789NED/table?ts=1758870110065>.

CBS (2022, September 27). Caribisch Nederland; gesproken talen en voertaal, persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82867NED/table?ts=1758871736192>.

References

- CBS (2022, September 27). Caribisch Nederland; kerkelijke gezindte, persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82868NED/table?ts=1758871816021>.
- CBS (2022, September 27). Caribisch Nederland; welzijn, persoonskenmerken. *StatLine*. Retrieved from: <https://opendata.cbs.nl/statline/#/CBS/nl/dataset/82866NED/table?ts=1758871378569>.
- CBS Aruba (n.d.). Tourism in Aruba 2009-2021. Retrieved from <https://cbs.aw/wp/index.php/2021/12/15/tourism-in-aruba-2018/>.
- CBS Curaçao (n.d.). Tourism: total visitor's tourist arrivals. Retrieved from <https://www.cbs.cw/tourism-2>.
- Commissie Integrale Sociaal-Economische Aanpak (1992). Rapport van de Commissie Integrale Sociaal-Economische Aanpak Bonaire.
- Council of State (2019, July 17). Voorlichting over de bestaande vormgeving tussen de Caribisch en Europees Nederland en de coördinerende rol van BZK.
- Croes, R., Semrad, K., Rivera, M., Alvarez, S. (2023). Strategic Tourism Masterplan. University of Central Florida.
- Curaçao Tourist Board. (2024). Tourism Performance 2023.
- Department of Statistics St. Maarten (n.d.) Total yearly stay-over developments. Retrieved from <https://stats.sintmaartengov.org/graphs.php?division=economy&topic=tes&graph=yrllyStayOver>.
- Dossier Koninkrijksrelaties (2025, December 1). Dutch Caribbean Islandhopper gaat vanaf Statia opereren. Retrieved from <https://dossierkoninkrijksrelaties.nl/2025/12/01/dutch-caribbean-islandhopper-gaat-vanaf-statia-opereren/>
- Dutch Caribbean Nature Alliance. (2020). State of Nature in the Caribbean Netherlands.
- EcoVision (2022). Environmental Impact Assessment For The Harbor Construction at Black Rocks, Saba.
- Ernst & Young LLP. (2024). Island Government of Public Entity Saba: Socioeconomic Impact Assessment. Final Report.
- Garcia, G. (2025). Life After the Volcano: Montserrat Rebuilding Efforts. The Borgen Project. Retrieved from <https://borgenproject.org/montserrat-rebuilding-efforts/>.
- Girardi, B. & Patraha, I. (2024). Bonaire, Sint Eustatius, and Saba in International Networks: Strategic Partnerships for Sustainable Development. The Hague Centre for Strategic Studies.
- Government of St. Kitts and Nevis. (n.d.). In *SKN Key Business Sectors* <https://www.gov.kn/in-skn-key-business-sectors/>.
- Inspectorate of Education (2025). De Staat Van het Onderwijs 2025 [English: State of Education 2025]. Retrieved from: <https://www.onderwijsinspectie.nl/documenten/rapporten/2025/04/16/rapport-de-staat-van-het-onderwijs-2025>.
- International Monetary Fund (2025, June 12). Dominica: 2025 Article IV Consultation-Press Release; and Staff Report. Retrieved from: <https://www.imf.org/en/Publications/CR/Issues/2025/06/12/Dominica-2025-Article-IV-Consultation-Press-Release-and-Staff-Report-567677>.
- International Panel on Deltas and Coastal Areas (2024), Introducing the IPDC Guidance Framework and the Climate Adaptation Context of the IPDC Members.
- Maes, E. (2024). Negative Impacts of Tourism on the Caribbean Environment, and How to Mitigate Them. Land Acknowledgment, 14.
- Mak, M., Smits, T., van Buiren, K.H.J.S. (2023). Digitale Infrastructuur Caribisch Nederland. Economisch Bureau Amsterdam.
- Mak, M., van Buiren, K.H.J.S., Bronkhorst, K., Nanne, J. (2024) Steep Island, High Prices: Quick Scan cost of living Saba. Economisch Bureau Amsterdam.
- Mak, M, van Buiren, K.H.J.S., Nanne, J. (2025a). Balancing Growth: Tourism, Nature, and Heritage on Bonaire. Economisch Bureau Amsterdam.
- Meesters, E. H., van der Geest, M., Kemeses van Uden, T., Boman, E., Butler, E., Hylkema, A., Lehwald, M., Wulf, K., Eckrich, C., & Francisca, R. (2025). *Conservation state of coral reefs and communities of the Caribbean Netherlands*. (Wageningen Marine Research report; No. C040/25). Wageningen Marine Research. <https://doi.org/10.18174/694539>
- Minimum Income Standard Committee of the Caribbean Netherlands (2023), A dignified existence: A Minimum income standard that raises the prospects for self-reliance.
- Ministries of Agriculture, Nature and Food Quality, Infrastructure and Water Management and Interior and Kingdom relations of The Netherlands (2020). Nature and Environment Policy Plan Caribbean Netherlands.
- Ministry of Housing and Planning & Ministry of Interior and Kingdom Relations (2023). Policy Agenda Bonaire, Sint Eustatius, Saba. Retrieved from <https://www.volkshuisvestingnederland.nl/documenten/2024/06/20/beleidsagenda-caribisch-nederland>

References

Ministry of Infrastructure and Water Management (2025). Memoire van toelichting. Wijziging van de Luchtvaartwet BES ter invoering grondslag openbare dienstverlening. Retrieved from <https://dossierkoninkrijksrelaties.nl/wp-content/uploads/2025/12/Memoire-van-toelichting-8.pdf>.

Ministry of the Interior and Kingdom Relations (2023, April 6). Intentiebrief economische ontwikkeling Caribisch Nederland. Rijksoverheid.

Ministry of the Interior and Kingdom Relations of Netherlands (2024). Brief aan Parlement: Effecten van aflopen subsidies op kosten van levensonderhoud op Bonaire, Sint Eustatius en Saba. <https://open.overheid.nl/documenten/441e42c9-7ae0-462b-a3a0-e486f9cac123/file>

Ministry of the Interior and Kingdom Relations (2025a, November 11). Cabinet Response to recommendations ROA and RLI on physical infrastructure Caribbean Netherlands. Retrieved from <https://www.rijksoverheid.nl/documenten/kamerstukken/2025/11/07/kabinetsreactie-op-adviezen-van-de-rli-rob-aef-inzake-de-fysieke-leefomgeving-van-caribisch-nederland>

Ministry of the Interior and Kingdom Relations (2025b, December 5). Kabinetsreactie op het rapport 'Gerichte Groei' van de Staatscommissie Demografische Ontwikkelingen Caribisch Nederland 2050. Retrieved from <https://www.rijksoverheid.nl/documenten/kamerstukken/2025/12/05/kamerbrief-met-kabinetsreactie-op-het-rapport-gerichte-groei-van-de-staatscommissie-demografische-ontwikkelingen-caribisch-nederland-2050>.

Montserrat Tourism Division. (n.d.). *Frequently asked questions*. Retrieved from <https://www.visitmontserrat.com/faqs/>.

Nanne J., van Gent, C., van Buiren, K., Knibbe, R. (2025b). Marktverkenning postconcessie Caribisch Nederland. Economisch Bureau Amsterdam.

Netherlands Airport Consultants (2022). Saba Airport Master Plan: Master Plan update.

Overseas Countries and Territories Association. (2021, September 14). *Saint-Barthelemy: European Overseas Territory*. OCTA. <https://www.overseas-association.eu/oct/saint-barthelemy/>.

Prime Minister's Office, Barbados. (2024). *Barbados Investment Plan: Barbados 2035 – A Plan for Investment in Prosperity & Resilience*. <https://pmo.gov.bb/wp-content/uploads/2024/11/Barbados-Investment-Plan.pdf>.

Public Entity Saba (2023a, April 6). Economische ontwikkeling en diversificatie. *Situatieschets en prioriteiten openbaar lichaam Saba*. Rijksoverheid.

Public Entity Saba (2023b, May). Public Health on Saba 2023-2026. Our journey towards a healthier tomorrow. Retrieved from <https://www.sabagov.nl/residents/public-health-sports/public-health-reports/public-health-on-saba-our-journey-towards-a-healthier-tomorrow>.

Public Entity Saba (2025a, May 15). *St. Eustatius and Saba address PSO and Increased Rates for Makana*. Retrieved from <https://www.sabagov.nl/news/st-eustatius-and-saba-address-psy-and-increased-rates-for-makana>.

Public Entity Saba (2025b, October 22). Reaction to 'Focused Growth' Report. Retrieved from <https://www.rijksoverheid.nl/documenten/kamerstukken/2025/12/05/kamerbrief-met-kabinetsreactie-op-het-rapport-gerichte-groei-van-de-staatscommissie-demografische-ontwikkelingen-caribisch-nederland-2050>

Public Entity Saba (n.d.) Multi-Annual Budget 2026-2029. Retrieved from <https://www.sabagov.nl/management-organization/about-public-entity-saba/finance/multi-annual-budget>

Public Entity Saba & State of the Netherlands (2023). Saba Package Agreement 2023-2027.

Raad voor het Openbaar Bestuur (2025, July 25). Advies bekostiging infrastructurele opgaven Caribisch Nederland.

Raad voor de leefomgeving en infrastructuur (2025, June 13). Samen naar beter: aanbevelingen voor het rijksbeleid voor het fysieke domein in Caribisch Nederland.

RAPPORT ANNUEL ÉCONOMIQUE 2023 (2024). INSTITUT D'ÉMISSION DES DÉPARTEMENTS D'OUTRE-MER. https://www.iedom.fr/IMG/pdf/ra_iedom_2023_ed.2024_-_saint-barthelemy.pdf.

Rijksinspectie Digitale Infrastructuur (2025, December 1). RDI verleent concessie aan Starlink voor satellietdiensten op BES eilanden. Retrieved from <https://www.rdi.nl/actueel/nieuws/2025/12/01/rdi-verleent-concessie-aan-starlink-voor-satellietdiensten-op-bes-eilanden>

Rijksoverheid (2023). *Ondertekening Letter of Intent voor betaalbaar wonen op Saba*. Retrieved from <https://www.rijksoverheid.nl/actueel/nieuws/2023/11/15/ondertekening-letter-of-intent-voor-betaalbaar-wonen-op-saba>.

State Commission Demographic Developments Caribbean Netherlands 2050 (2024). *Gerichte Groei*.

Statistics Department Montserrat. (2025, January). *Mid-year population estimates 2019–2024*. Retrieved from <https://statistics.gov.ms/subjects/social-and-demographic-statistics/population-and-demography/mid-year-population-estimates-2019-2024/>.

Statistics Department Montserrat. (2025, January 16). Passenger movements (arrivals), monthly 2009 to 2024 - Statistics Department Montserrat. Retrieved from <https://statistics.gov.ms/subjects/economic-statistics/tourism-and-travel/passenger-movements-arrivals-monthly-2009-to-2024/>.

References

Tweede Kamer der Staten-Generaal (2023). *Vastelling van het begrotingsstaten van Koninkrijksrelaties (IV) en het BES-fonds (H) voor het jaar 2024*. Retrieved from <https://zoek.officielebekendmakingen.nl/kst-36410-IV-34.html>.

Van Berkel, K. en van Vuuren, D. (2025), Publieke sector Caribisch Nederland legt groot beslag op arbeidsmarkt. Economisch Statistische Berichten.

Van Buiren, K.H.S., Behrens, C., Boonekamp, T. (2018). Connectiviteit Caribische deel van het Koninkrijk: Ontwikkelingen, publieke belangen en opties voor borging van connectiviteit. SEO Economisch Onderzoek.

Van Buiren, K.H.S. & M. Gerritsen (2020). Kleine eilanden Grote uitdagingen: Het Caribisch deel van het Koninkrijk in regionaal perspectief: prestaties, kansen en oplossingen. Economisch Bureau Amsterdam.

Van Buiren, K.H.S. (2024, December 12). Volkshuisvesting Caribisch Nederland. Position paper EBA t.b.v. rondetafelgesprek Volkshuisvesting in Caribisch Nederland. Retrieved from https://www.tweedekamer.nl/debat_en_vergadering/commissievergaderingen/details?id=2024A07638.

Van Buiren, K.H.S. (2025). Hoge lonen zetten concurrentiepositie Caribisch Nederland onder druk. Economisch Statistische Berichten.

Van Buiren, K.H.S., Nanne J., en Buys-Trimp, M. (2025c). Gelijke kansen, voldoende middelen: Onderzoek naar de toereikendheid van de bekostiging van het primair en voortgezet onderwijs in Caribisch Nederland. Economisch Bureau Amsterdam.

Van Geelen (2020). Supply chain of food imports – Bonaire, Sint Eustatius and Saba. Rijksdienst voor Ondernemend Nederland.

Van Vuuren, D., Roozendaal, W., Van Berkel, K., Bij de Vaate, V., Doeve, T., Dekker, F., Van Lint, S. (2025). Arbeidsrecht Caribisch Nederland: Theorie, praktijk en verbetermogelijkheden. SEO Economisch Onderzoek & Vrije Universiteit Amsterdam.

United Nations Conference on Trade and Development (UNCTAD). (2025, July 14). *Real gross domestic product: Total and per capita, growth rates, annual*. Retrieved from <https://unctadstat.unctad.org/datacentre/dataviewer/US.GDPGR>.

World Bank. (n.d.). *Population ages 65 and above (% of total population)*. World Bank. Retrieved from <https://data.worldbank.org/indicator/SP.POP.65UP.TO.ZS>.