

**NATIONAL SOCIO-ECONOMIC  
DEVELOPMENT PLANNING FRAMEWORK  
FOR THE TURKS AND CAICOS ISLANDS**

**(2006-2015)**

*Annex IV*  
*Physical Development Situational Analysis Report*

**Submitted to:**

Department of Economic Planning and Statistics  
Ministry of Finance, Health and National Insurance

*Grand Turk, Turks & Caicos Islands  
British West Indies*

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## ACRONYMS

ASC	-	Agricultural Sub-Committee
CPLs	-	Conditional Purchase Lease Agreements
DECR	-	Department of Environment and Coastal Resources
DEPS	-	Department of Economic Planning and Statistics
GDP	-	Gross Domestic Product
NPDP	-	National Physical Development Plan
SDPI	-	Sustainable Development Planning Initiative
TCI	-	Turks and Caicos Islands
TCIG	-	Turks and Caicos Islands Government
TCIHTA	-	Turks and Caicos Islands Hotel and Tourism Association
UK	-	United Kingdom

## 1.0 INTRODUCTION

The realisation of sustainable development goals and objectives dictates the optimum utilisation of all of the resources of a country – land as much as labour, capital, and technology.

This is so particularly in an economy such as the Turks and Caicos Islands (TCI) which is so heavily dependent upon the land base, and where the manner in which this resource is utilised can adversely impact the resources on which two of the main drivers, in this case the Tourism Resort Industry and the Fisheries Industry, are based and, hence, the economic and social well-being of the country.

By the same measure, economic and social development strategies have implications for the physical development of the country, and therefore must be considered and formulated within a spatial context, and include appropriate physical planning policies designed to ensure that economic and social activities are accommodated on the available land space in as sustainable a manner as possible.

Hence the methodology for the preparation of the Comprehensive National Socio-economic Development Planning Framework for the TCI involves consideration of the physical planning dimension within the limitations imposed by the lack of adequate information on some of the relevant issues. The scope of this report is to present a situational analysis of physical planning and development in the TCI and draws on:

- Published and unpublished data collected from secondary sources;
- Reports of the sub-committees for the preparation of the Comprehensive Socio-economic Development Planning Framework; and
- Primary data collected from interviews with key informants and through field visits.

The report includes a review of the demographic and physical characteristics of the TCI, its settlement patterns, and land related issues that are likely to impact the country. The report also examines the current development commitments and factors influencing future development, including the institutional framework for physical planning.

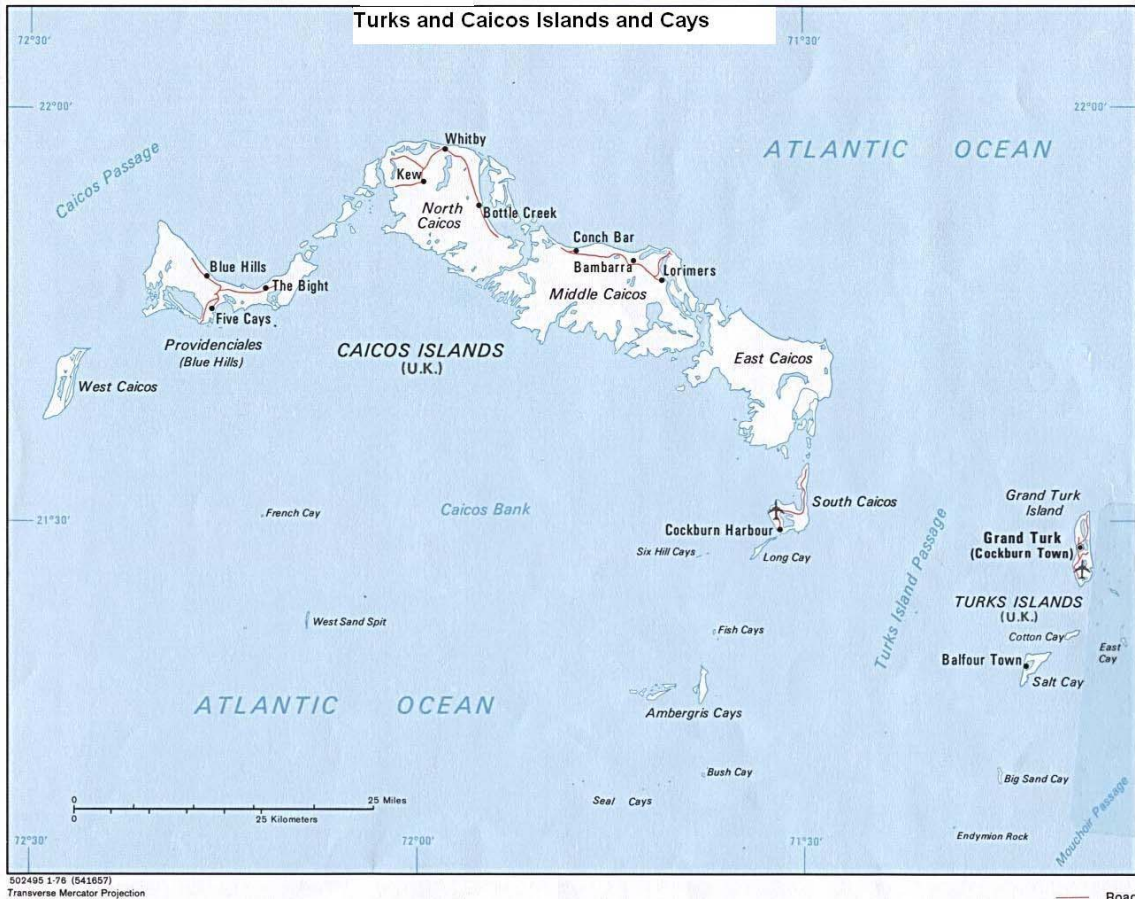
## 2.0 PHYSICAL FEATURES

The TCI is situated in the North Atlantic Ocean approximately 90 miles north of the Dominican Republic and Haiti, and 575 miles southeast of Miami, between latitude 21<sup>0</sup> and 22<sup>0</sup> north and longitude 71<sup>0</sup> and 72<sup>0</sup>30' west (Map 1).



**Map 1: TCI Location**

The country is made up of an archipelago of islands stretching a distance of approximately 75 miles east to west and 50 miles north to south, and separated into two groups by the 22 mile wide Turks Island Passage. The Turks Islands, to the east of the passage, consist of two inhabited islands – Grand Turk and Salt Cay – and a number of uninhabited cays. The Caicos Islands, on the other side of the passage, include the inhabited islands of South Caicos, Middle Caicos, North Caicos, and Providenciales; the uninhabited islands of East Caicos and West Caicos; and a number of large cays, including Parrot Cay (Map 2).



**Map 2: TCI Islands and Cays**

The total area covered is 193 square miles (123,520 acres) made up as follows:

<u>Islands</u>	<u>Square Miles</u>	<u>Acres</u>
(a) Inhabited Islands		
Grand Turk	7.0	4,480
Salt Cay	2.5	1,600
South Caicos	8.5	5,440
Middle Caicos	48.0	30,720
North Caicos	41.0	26,240
Providenciales	37.5	24,000
East Cays	5.0	3,200
<i>Sub-total</i>	<i>149.5</i>	<i>95,680</i>

(b) Uninhabited Islands

West Caicos	9.0	5,760
North Caicos Cays	3.0	1,920
Middle Caicos Cays	1.0	640
East Caicos	18.0	11,520
East Caicos Cays	8.5	5,440
Southern Cays	3.0	1,920
Turks Islands Cays	1.0	640
<i>Sub-total</i>	43.5	27,840
<b>Total</b>	<b>193.0</b>	<b>123,520</b>

*Source: National Physical Development Plan (NPDP) 1987, based upon information provided by the Land Registration and Survey Department, Grand Turk.*

There are also approximately 150 square miles (96,000 acres) of tidal flats along the south coast of Middle Caicos, North Caicos, and East Caicos. According to the 1987 NPDP there were, in addition at that time, 65,902 acres of marine wetlands including red and black mangrove forests. These systems are important for the functions which they perform as follows:

- Protecting the shoreline against storm surge, flooding, erosion, and tsunamis;
- Filtering sediments and other pollutants before they reach the sea, and thus preventing siltation of the reefs which surround the islands;
- Providing habitat for avifauna and other wildlife, the North Caicos tidal flats being, for example, home to the largest population of West Indian Flamingos in the country.

The islands are of coral formation, and are essentially low-lying, the highest point being the 163 foot high Flamingo Hill on East Caicos. Hilly areas occur, as well, along the eastern portions of Grand Turk and South Caicos, and in central Providenciales.

Barrier reefs run parallel to the shore and serve to protect the coastline from wave action, storm surge, erosion, and the effects of tsunamis. Patch reefs are found inshore of the barrier reefs. Both function as nurseries and habitat for a number of fish species including conch and lobsters, and are also important recreational attractions providing diving and snorkelling opportunities for residents and visitors.

There are excellent recreational beaches on all of the islands complemented by clear turquoise waters.

The country enjoys a tropical climate with average temperatures of 76 degrees Fahrenheit in winter and 83 degrees Fahrenheit in summer. The average annual rainfall for the Turks Islands is 27 inches, and for the Caicos Islands the quantum is 32 inches.

Vegetation on the Turks Islands consists of shrub and crab grass. On the Caicos Islands the dominant vegetation type is dense scrub and low trees, with the exception of Middle Caicos and North Caicos, on which there is a more luxuriant type of vegetation.

### 3.0 NATURAL HAZARDS

The degree to which natural hazards can become disasters depends, to a large extent, upon the placement of development with respect to the hazards to which the country is prone by virtue of its location, topography, climate, and other natural features. The following need to be considered in the exercise of planning for the utilisation of land in the TCI.

#### 3.1 *Hurricanes and Tropical Storms*

The country is located within the hurricane belt and has, over the past century, been affected by disastrous hurricanes in 1908, 1926, 1928, 1945. In more recent times Hurricanes Donna, in 1969, and Kate, in 1985, caused significant damage to property. Hurricane Frances in September 2004 resulted in some property damage in Grand Turk.

#### 3.2 *Inland Flooding*

Inland flooding has accompanied these hurricanes and also tends to follow heavy rains, as has occurred on Grand Turk, North Caicos, and Providenciales in recent years. Tropical storm Erin in July 1995 caused flooding in North Caicos and Providenciales that was considered to be the worst in 80 years. In 2004 the islands were affected by Tropical Storm Jeanne which caused severe flooding, and forced the evacuation of persons from some areas of Grand Turk, Salt Cay and South Caicos.

#### 3.3 *Coastal Hazards*

There is also potential for storm surge and for coastal flooding resulting from breaches in sea defence mechanisms and sand dunes during occurrences of high seas. The possibility of property damage is heightened by the construction of buildings without adequate setbacks from the coast and within areas that are naturally at risk.

Another hazard which affects some parts of the coast is erosion. For this reason some areas, at Cockburn Town on Grand Turk, for example, are protected by sea walls, but these are not always maintained. Emerald Beach in Providenciales has been observed to have suffered serious erosion between 1995 and 2001.

There is also potential for sea level rise, but there is no information on the extent to which this has taken place in the TCI.

The tsunami is another phenomenon to which the islands may be susceptible by virtue of their topographical make-up.

### **3.4 Droughts**

There have been occasional periods of drought, some lasting as long as three months. The worst such event took place in 1962 when only 1.8 inches of rainfall was recorded in the country.

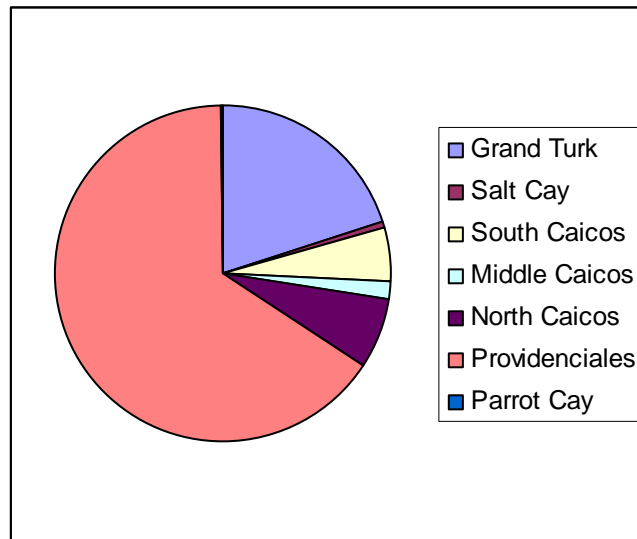
## 4.0 DEMOGRAPHIC CHARACTERISTICS

### 4.1 Population Size, Growth, and Distribution

The Population and Housing Census 2001 recorded a total population of 20,014 inclusive of 19,886 persons living in households. The population of the country as determined by the last five census exercises is indicated at Table 1 below, and the current distribution of the numbers is reflected in the chart in Figure 1.

**Table 1: Population by Island and Census Year**

Island	1960		1970		1980		1990		2001	
	No	% of total	No	% of total	No	% of total	No	% of total	No	% of total
Grand Turk	2,180	38.5%	2,287	41.1%	3,098	41.9%	3,691	32.2%	3,976	20.0%
Salt Cay	448	7.9%	334	6.0%	284	3.8%	208	1.8%	120	0.6%
South Caicos	840	14.8%	1,018	18.3%	1,380	18.6%	1,198	10.4%	1,063	5.3%
Middle Caicos	532	9.4%	362	6.5%	396	5.3%	272	2.4%	301	1.5%
North Caicos	1,150	20.3%	999	18.0%	1,278	17.2%	1,275	11.1%	1,347	6.8%
Providenciales	518	9.2%	558	10.0%	977	13.2%	4,821	42.0%	13,021	65.5%
Parrot Cay		n.a.		n.a.	n.a.		n.a.		58	0.3%
<b>Total</b>	<b>5,668</b>	<b>100.0%</b>	<b>5,558</b>	<b>100.0%</b>	<b>7,413</b>	<b>100.0%</b>	<b>11,465</b>	<b>100%</b>	<b>19,886</b>	<b>100%</b>



**Figure 1: Population share by Island 2001**

The figures indicate a steady increase in the population since decline was recorded over the 1960 to 1970 inter-censal period. The decline and decreasing rate of growth of the population during that time reflects the movement of persons out of the country following the termination of the salt industry. During this period internal shifts of population were effected by the some movement of the population of Salt Cay and

Middle Caicos to Grand Turk and Providenciales which, along with South Caicos, experienced an increase in their share of the total population.

The increase from 5,558 in 1970 to 7,413 in 1980 represents an overall growth rate of 33.4 per cent and average annual rate of 3.3 per cent. During this period there was a further decrease in the percentage of the population resident on Salt Cay and Middle Caicos, while the population of Providenciales increased by 419 persons (or 75%) and Grand Turk by 817 or 35%.

In this inter-censal period growth of Providenciales was induced by the 1967 lease-purchase agreement between the TCI and British Governments and Provident Limited which allowed the latter to develop 4,000 acres of Crown Land on the island on condition that the lessee build an airstrip, air terminal, gravel roads and a hotel. By 1970 construction had been completed on a 4,500 foot surfaced runway, air terminal building, and the Third Turtle Inn.

The growth of Providenciales over the following two decades was even more dramatic, and reflected the fast-paced physical development of the island for tourism resort purposes, precipitated by the December 1984 opening of the Club Med resort, and supported by a new 7,600 foot jet runway, airport terminal, and paved roads. This development resulted in the first significant spurt of growth of Providenciales, boosted by increased investment in the Tourism sector. The impact is reflected in the growth of the overall population between 1980 and 1990, by 54.7 per cent, an average of 5.5 per cent each year, and an almost five-fold increase in the population of the island.

The overall increase between 1990 and 2001 was by 73.4 per cent, an average of 6.7 per cent per year. During this period there was an almost three-fold increase in the population of Providenciales, whose growth has been at the expense of all of the other islands, in particular Salt Cay, South Caicos, and Middle Caicos which experienced absolute declines in their population base over the years.

It is noteworthy that Providenciales increased its share of the total TCI population from 9.2 per cent in 1960 to 65.5 per cent in 2001 – from 518 persons to 13,021.

Population statistics also reveal that the rate of natural increase has been on the decline. The growth rates recorded, and the uncharacteristic bulge in the 2001 population pyramid at the 25 to 39 age groups, therefore reflects the movement of persons into the country to meet demand for labour during construction and operational phases of the rapidly expanding Tourism sector. Indeed, the 2001 Population and Housing Census indicates that only slightly over half of the country's population at that time comprised TCI nationals.

## **4.2 Population Projections**

Projections prepared by the Department of Economic, Planning and Statistics (DEPS) place the 2006 population at approximately 33,202, an increase of over 13 per cent per

year since the 2001 census was undertaken, and projects the 2015 population to reach approximately 51,507 (Table 2).

At the present time, Providenciales is estimated to accommodate 24,348 permanent residents or 73.3 per cent of the total population, while Grand Turk is estimated to contain 5,718 persons or 17.2 per cent of the population of the country. Salt Cay's population is expected to have declined further, in both absolute and relative terms, to 114 or 0.3 per cent of the total, while South Caicos should have slightly increased to 1,118 but would have continued to decline in terms of share, as had Middle Caicos and North Caicos.

**Table 2: Population by Island Census Year, 1990 and 2001, with Projections for 2006**

Island	1990		2001		2006		2015
	No	% of total	No	% of total	No	% of total	
Grand Turk	3,691	32.2%	3,976	20.0%	5,718	17.2%	
Salt Cay	208	1.8%	120	0.6%	114	0.3%	
South Caicos	1,198	10.4%	1,063	5.3%	1,118	3.4%	
Middle Caicos	272	2.4%	301	1.5%	307	1.0%	
North Caicos	1,275	11.1%	1,347	6.8%	1,537	4.6%	
Providenciales	4,821	42.0%	13,021	65.5%	24,348	73.3%	
Parrot Cay		n.a	58	0.3%	60	0.2%	
<b>Total</b>	<b>11,465</b>	<b>100.0%</b>	<b>19,886</b>	<b>100%</b>	<b>33,202</b>	<b>100.0%</b>	<b>51,507</b>

Source: Population and Housing Census 2001 and DEPS.

### 4.3 Population Density

There has been a corresponding increase in the density of the population of the country as shown in the Table 3 below.

**Table 3: Population Density TCI 2001, 2006, and 2015**

Year	Population	Density*
2001	19,886	137.6
2006	33,202	229.8
2015	51,507	356.4

\* Based on the area of the inhabited islands only, a total of 144.5 square miles

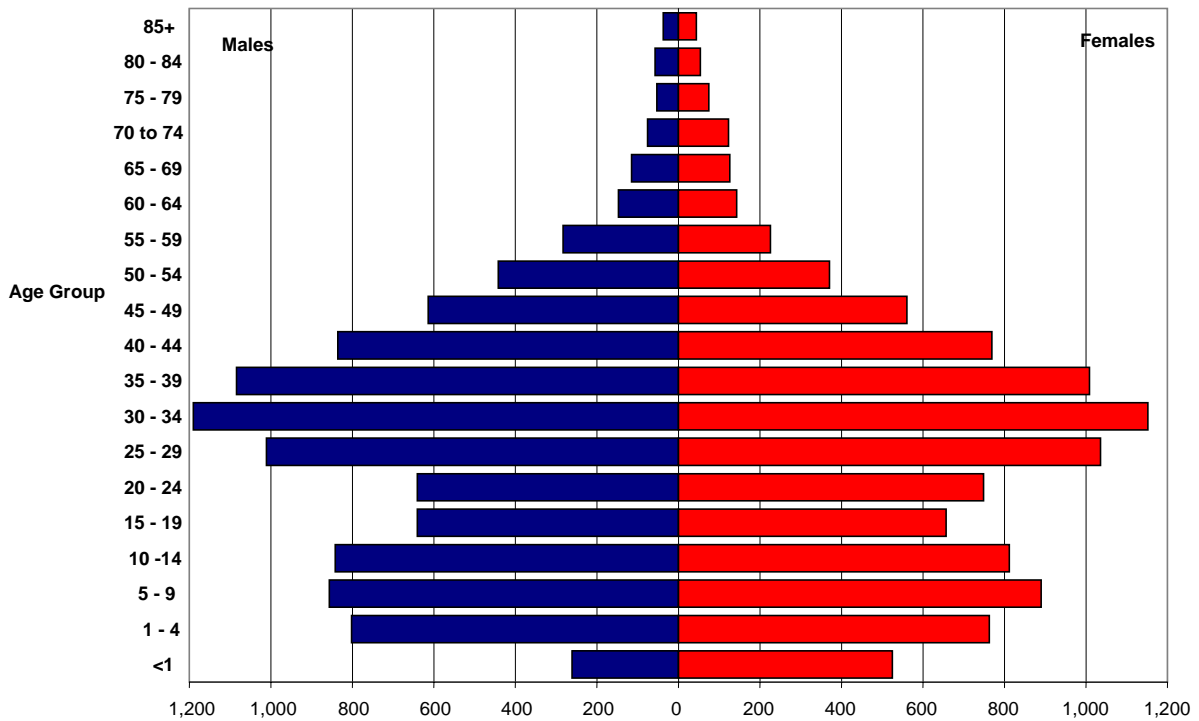
The overall density based on the area of the inhabited islands was 137.6 persons per square mile. However, there is a wide disparity in the density at which the islands have developed:

Grand Turk	568
Salt Cay	48
South Caicos	125
Middle Caicos	6
North Caicos	32
Providenciales	347

#### 4.4 Other Relevant Population Dimensions

There are a number of other aspects of the population that have implications for the economic, social, and physical planning of the TCI. The following analysis is based upon statistics contained in the Population and Housing Census 2001:

- The average household size was 2.74, and 15.9 per cent (1,149) of the total number of households contained more than four persons; the islands with the highest percentage of households having more than four persons were North Caicos with 103 or 23.2 per cent, and Grand Turk with 284 or 21.7 per cent, although both had average household sizes of approximately 3.03; the number of households on Providenciales which contained more than four persons was 674 or 13.7 per cent of the 4,924 households on the island;
- The number of persons in the working age group (15 to 60) was 13,215 or 66.5 per cent of the population; of these, 77.0 per cent of the labour force was employed;
- The dependent population, that is, persons under 15 and over 60, totalled 4,345 or 21.8 per cent of the population;
- The over-64 population totalled 757 persons, 3.8 per cent;
- The school age population (5 to 14) represented 17.0 per cent of the population and amounted to 3,368 young persons; and
- Nationally, the population was almost equally divided between the sexes (see figure 2 following); this held true on all of the islands except on Grand Turk where 47 per cent was male and 53 per cent female, perhaps reflective of the migration of more males than females to find employment on Providenciales.



**Figure 2: TCI Population Pyramid, 2001**

*Source: Population and Housing Census 2001.*

The past and expected rapid rate of growth of the population and the steadily increasing density at which the land is being developed has implications for planning for the provision of land to meet demand for residential accommodation in particular, as well as supporting social and physical infrastructure including health, educational, child welfare and other facilities for children, and geriatric care.

Of particular concern is the increase in the density of development on Providenciales, from 26 persons per square mile in 1980 to 347 in 2001. There are indications that the pace of development reflected in these figures has surpassed the ability of the Government to meet the needs of the population of the island for housing and other facilities. On the other hand, the extent of the de-population of some of the other islands is such as to create severe challenges for the provision of those goods and services which require a critical mass of persons.

## 5.0 SETTLEMENT PATTERN

The settlement pattern of the country will impact the extent to which existing and future development can be re-arranged or arranged to facilitate the realisation of economic and social goals and objectives. In-depth study of the factors determining the settlement pattern has, however, not been possible, and must take place during the course of the preparation of the NPDP.

The economy of the TCI has traditionally shaped the settlement pattern of the country. Settlements have also evolved in response to various administrative, physical, and social factors.

The earliest post-Columbian formal settlements were comprised of American Loyalist refugees who arrived from the United States with their slaves starting around 1789 after the War of Independence. They settled in the Caicos Islands where they established an economy based on the cultivation of cotton, sisal, and other crops. The failure of these efforts led to the departure of the Americans leaving the slaves to continue settlement supported by a different set of economic activities.

Subsequently, and until 1964, the salt industry formed the main pillar of the country's economy, and during this period the focus of development was Grand Turk, Salt Cay, and South Caicos. The industry not only determined the distribution of the population over the country, but its infrastructure helped to shape the pattern of settlement on each of the salt-producing islands where the salinas served as limits to development or growth boundaries.

The closure, after three centuries, of production operations at Grand Turk and South Caicos in 1964, and Salt Cay in 1975, forced the country to look to other natural resources for its economic sustenance, and this led to the development of the Tourism and Fisheries sectors. Currently, the economy is based upon these activities and Offshore Financial Services, with Tourism being the largest contributor to Gross Domestic Product (GDP), employment, and income. With Providenciales as the centre of the Tourism industry, the focus has once again shifted as indicated earlier. Grand Turk, the main location of the Offshore Financial Services and administrative capital of the country fills the second place.

With the exception of parts of Providenciales settlements in the TCI can be classified as rural. The sparseness of the population on some of the islands and the physical separation of the settlements create challenges to the economic provision of even the most basic infrastructure and services.

### 5.1 *Grand Turk*

Grand Turk has remained the administrative and political capital, notwithstanding the pull of Providenciales, because of deliberate Government policy to retain the island as the administrative seat of the country. Located on the island are the higher-order goods

and services as well as social and protective facilities including primary, secondary and tertiary level educational facilities.

Most of the population is settled in the mid-western portion of the island. The early history of settlement on the island saw the population concentrated in Cockburn Town, Overback and West Road, and later Back Salina, which are fairly densely built-out subdivisions. These coalesce to form a continuous settlement interrupted only by the salinas. Over the past 15 years, there has been a slow but steady movement of population from Cockburn Town in particular into the Breezy Brae, Palm Grove, North Creek, and The Ridge areas which are sparsely developed communities. Breezy Brae is a medium density settlement, while the North Creek and The Ridge settlements are subdivided at lower densities. The breakdown of the population by settlement at the time of the 2001 census is as follows in Table 4:

**Table 4: Grand Turk Settlements**

<b>Settlement</b>	<b>Population</b>
Salina	1,361
Breezy Brae	377
Cockburn Town	116
North Creek	229
Overback	572
Palm Grove	588
The Ridge	234
Waterloo	15
West Road	481
Hawkes Nest	3
<b>Total</b>	<b>3,976</b>

*Source: Population and Housing Census 2001*

The population of Cockburn Town was 320 at the time of the 1980 census (204 more than at the time of the 2001 count), at which time Overback contained 836 persons (264 more than in 2001), and West Road contained 718 persons (237 more than in 2001).

## 5.2 *Salt Cay*

The 120 residents of this island live in the Balfour Town settlement located along the coast between the shoreline and the island's main salina, and to the north and south of the salina.

## 5.3 *South Caicos*

The population of South Caicos – a total of 1,063, is split between the two settlements on the island. Cockburn Harbour (Town Area), with a population of 546, is hemmed in between the salina and the coast in the southwest, while the other – Out North, The Flat and Airport which contains approximately 546 persons and is essentially a group of smaller settlements located in the airport area.

#### 5.4 *Middle Caicos*

There are three distinct settlements on Middle Caicos, all restricted to the northern end of the island by the extensive areas of wetlands and mudflats which comprise most of its landmass. Conch Bar is the main settlement. The others are Lorimers at the eastern end of the island, a once thriving settlement built on sisal farming until the abandonment of that crop by the Loyalists, and Bambarra which is situated between the two.

#### 5.5 *North Caicos*

Settlement on North Caicos has also been determined in large measure by natural features, *viz.*, the occurrence of wetlands and mudflats, the population being confined largely to the developable portion of the land to the north.

The island's population is settled in distinct agricultural-based communities at Bottle Creek and Kew, and fishing settlements at Whitby and Sandy Point. Bottle Creek with 645 persons in 2001, is by far the largest of the four, and is strung out along a three-mile stretch of the north-south road. These are all situated along the coast, with the exception of Kew.

It is notable that the population of Sandy Point has more than doubled, from 59 in 1990 to 140 in 2001, while that of the other settlements either declined or experienced only small increases. The growth of Sandy Point is attributed to its proximity to Parrot Cay whose resort provides employment for a number of the residents of that settlement.

#### 5.6 *Providenciales*

Providenciales is the only centre in the country that displays features of urbanisation, including a town centre containing tertiary level economic activity such as higher-order retail establishments and private-sector offices, and relatively large settlements. The growth of the Tourism Resort Industry has generated a range of financial services including banks and insurance companies, as well as real estate agencies and surveying and accounting services, which are located on the island.

Settlement here has been shaped by the following natural and administrative factors:

- Frenchmen's Creek and Chalk Sound in the southwest, and tidal flats elsewhere on the island;
- Juba Point Salina in the southeast; and
- Government land policy and the NPDP which has, until recently, served to keep the extensive area of publicly owned land in the northwest free from development.

As a result, the settlements are concentrated in the middle and eastern portions of the island with the most populous being, according to the 2001 census, Five Cays, Honda Road, and the Bight. Table 5 shows the population numbers for each of the settlements.

**Table 5: Providenciales Settlements**

<b>Settlement</b>	<b>Population</b>
The Bight	1,696
Blue Hills	896
Blue Mountain, Cherokee Road	343
Chalk Sound	528
Discovery Bay, Cheshire Hall	1,041
Downtown	250
Five Cays	1,963
Grace Bay	166
Honda Road	1,760
Juba	363
Kew Town	1,024
Leeward	878
Long Bay Hills	334
Turtle Cove and Richmond Hill	472
Wheeland	1,307
<b>Total</b>	<b>13,021</b>

*Source: Population and Housing Census 2001*

Five Cays is a densely developed low-income settlement with a significant amount of unauthorised development, in the area to the south of the airport. Honda Road is another largely low-income densely developed community of mainly TCIslanders, located between the Blue Hills area and the airport, while the Bight is essentially a group of small settlements along the Leeward Highway.

The largest of the other settlements on the island are:

- Blue Hills, a fairly linear settlement along the Millenium Highway and the coast in the north west of the island which sprung up as a fishing settlement and remains a community occupied by low-income households and containing a significant amount of unauthorised development. This settlement is almost continuous with Wheeland;
- Discovery Bay/ Cheshire Hall, another compact settlement located directly north of the airport; and
- Kew Town, a densely settled community of TCIslanders located close to the airport.

## 6.0 LAND

Adequate land, at strategic locations, is required for the realisation of goals and objectives on which economic and social plans are based. The availability of land has been identified, in public consultations conducted to date, as an issue to be addressed in the Framework. It is important, therefore, to determine the amount of land available for future development, the pattern of tenure of the land, the manner in which it is utilised to accommodate the activities of the various sectors of the economy and to meet housing and other social needs, and the extent to which it is committed to development.

### 6.1 Tenure

Cadastral mapping for Grand Turk shows large sections of the island subdivided into residential sized plots between 5,000 square feet and one-quarter acre in the western portion of the island to the north of the airport, and in the central east. The remainder of the land, particularly in the area to the south of the airport is held in large parcels. On Providenciales, most of the eastern portion of the island is divided into residential plots while the west is retained in larger plots, including the 4,000-acre plot of Crown Land in the northwest. These maps are included in the appendix to this report. Cadastral mapping for the other islands has not yet been obtained.

Complete and reliable information on the ownership of land to the degree required to inform this planning exercise is not available at this time. It is known, however, that the Crown owns the largest extent of land in the country, retaining possession of all of West Caicos, almost the entire western portion of Providenciales, and much of Grand Turk, South Caicos, Middle Caicos and North Caicos. Salt Cay is mainly under private ownership. Table 6, a combination of Tables 11 and 12 of the May 2005 report Crown Land Policy, TCI Final Report (Crown Land Policy) shows the numbers and acreage of Crown-owned parcels of land in the islands and the extent to which these plots have been allocated.

The data indicate that there are over 1,800 parcels that had not, at the time of compilation of the information, been transferred by the Crown. Further information relating to the location and size of these parcels is required before a determination can be made of the availability and suitability of the land for development purposes.

**Table 6: Crown Land Parcels and Acreage, Unalienated and Alienated, by Island**

Island	Number of Parcels	Acreage	Unalienated Parcels	Acreage	Alienated Parcels	Acreage
Grand Turk, S. Cay	1,075	4,117	444	3,140	631	977
South Caicos	620	5,276	329	4,183	291	1,093
East Caicos	93	12,529	92	12,437	1	92
Middle Caicos	306	12,280	243	12,175	63	105
North Caicos	909	12,032	347	8,692	562	3,340
Providenciales	2,844	16,460	357	5,472	2,487	10,989
West Caicos	1	No Data	1	No Data	1	No Data

The records of the Land Registry reveal that 1,364 Crown Land leases were granted between 1999 and 2004 as indicated at Table 7 below.

**Table 7: Crown Land Leases Granted, 1999 to 2004**

Island	Number	Percentage
Grand Turk	257	19.0
South Caicos	59	4.3
Middle Caicos	10	0.7
North Caicos	109	8.0
Providenciales	929	68.0
<b>Total</b>	<b>1,364</b>	<b>100.0</b>

Source: Crown Land Policy, TCI based on Land and Surveys Data.

Other relevant information on land ownership is available from surveys carried out for the 1999 assessment of standard of living in the TCI with respect to land occupied for residential purposes, and recorded at Table 43 of the relevant report and reproduced in Table 8.

**Table 8: Residential Land Tenure, TCI (1999)**

Tenure type	Percentage
Owned	42.1
Leasehold	2.3
Rented	5.3
Permission to work	1.0
Sharecropping	0.8
Squatted	42.3
Other, not stated	6.2

Source: Standard of Living Assessment, 1999

Based on the Report, the figures show the largest number of households to be located on land to which the occupants have no legal entitlement, that is, land that is squatted upon. The island with the greatest incidence of squatting was found to be Grand Turk with 46.1 per cent of households in this category, followed by Providenciales with 40.3 per cent, and South Caicos 37.9 per cent. This form of tenure was lowest on North Caicos

where only 5.5 per cent of households were so classified, while Salt Cay and Middle Caicos had 22.4 per cent and 21.3 per cent respectively. Correspondingly, land ownership by householders was low on Providenciales – 35.0 per cent, and on North Caicos was 64.1 per cent, Middle Caicos 70.7 per cent, South Caicos 51.2 per cent, Grand Turk 51.4 per cent, and Salt Cay 73.5 per cent.

One of the stated goals of Government is to utilise Crown Land to empower Belongers to participate meaningfully in the economic and social development of the country. Under current Crown Land Policy, the Government is committed to providing land to nationals of the country for Residential and Commercial purposes including hotels, resorts, light manufacturing, and wholesaling activities.

Crown Lands are sold to Belongers for residential purposes, based upon layouts prepared by the Department of Planning and approved by Executive Council, under Conditional Purchase Lease Agreements (CPLs). These agreements require the development of the plot within a specified period of time, usually three years, in order to avoid land being purchased and held speculatively. There are, however, many instances in which the lack of infrastructure in government subdivisions has acted as a major constraint to the development of the individual plots for residential purposes.

Land is also sold by the Government for commercial purposes with construction deadlines. In accordance with current policy, parcels of Crown Land in excess of ten acres and intended for large scale commercial developments are leased under long-term agreements for periods of up to 99 years. Under the arrangements and in the absence of an up-to-date national physical development plan for the country, the allocation process and the use to which the land is put tends to be determined by developers and the desire of the Government to encourage physical development for economic and social reasons.

The need has been recognised and expressed for a forward planning approach to be taken to the allocation and management of Crown Land within the framework of a comprehensive physical development plan in order to ensure the sustainable development of the country.

The best known example of Crown Land sold for large scale development is the 1967 transaction with Provident Limited with respect to land on Providenciales. The land was subsequently subdivided and sold for residential purposes, mainly lower density development targeted to the higher income groups, *viz.*, Turtle Cove, Long Bay Hills, Grace Bay, Thompson Cove, Turtle Tail, Sapodilla, and Leeward. A large number of the plots created by these subdivisions remain undeveloped to date as they appear to be held speculatively.

## 6.2 Land Use

Land use information required to be factored into the physical planning process at national level includes the location of the major land use activities and the quantity of land under those uses.

The scope of this current exercise does not permit a detailed land use survey to determine the acreages under the various uses. The information on which this section is based is obtained from windscreen and aerial surveys of the islands, personal communication, and information contained in the Population and Housing Census 2001 and other documentation.

Most of the land is undeveloped, built development occupying only a small portion of the space. On Grand Turk, Salt Cay, and South Caicos salinas occupy significant acreages, while on Middle Caicos, North Caicos, and East Caicos, wetlands account for much of the land space. There are also large areas of Providenciales under water, viz., Chalk Sound, Frenchmen’s Creek, and Juba Salina.

### **6.2.1 Protected Areas**

One category of land that would need to be excluded from the quantum available for development purposes is the group that is protected by various legislative instruments and/or international agreements and conventions.

A total of 33 areas are protected under the TCI National Park Ordinance (1989) either as National Parks, Nature Reserves, Sanctuaries, or Areas of Historic Interest. These are listed in Table 9, and shown on the maps in the appendix.

**Table 9: Protected Areas, TCI**

<b>Island</b>	<b>Protected Areas</b>
Grand Turk	Columbus Landfall Marine National Park Grand Turk Cays Land and Sea National Park - (including Gibbs and Penniston Cays) South Creek National Park Long Cay Sanctuary
Salt Cay	Big Sand Cay Sanctuary H.M.S.Endymion Wreck Area of Historical Interest Salt Cay Area of Historical Interest
South Caicos	Admiral Cockburn Land and Sea National Park Admiral Cockburn Nature Reserve (including Long Cay) Bell Sound Nature Reserve Boiling Hole Area of Historical Interest
Middle Caicos	Conch Bar Caves National Park Vine Point (Man O’War Bush) and Ocean Hole Nature Reserve
North Caicos	East Bay Islands National Park Fort George Land and Sea National Park Cottage Pond Nature Reserve Dick Hill Creek and Bellefield Landing Pond Nature Reserve Pumpkin Bluff Pond Nature Reserve Three Mary Cays Sanctuary Fort George Area of Historical Interest

Island	Protected Areas
North, Middle and East Caicos	North, Middle and East Caicos Nature Reserve (International Ramsar Site)
Providenciales	Chalk Sound National Park North West Point Marine National Park Princess Alexandra Land and Sea National Park North West Point Pond Nature Reserve Pigeon Pond and Frenchman's Creek Nature Reserve Princess Alexandra Nature Reserve Cheshire Hall Area of Historical Interest Sapodilla Hill Area of Historical Interest
West Caicos	West Caicos Marine National Park Lake Catherine Nature Reserve
Caicos Banks	French, Bush and Seal Cays Sanctuary Molasses Reef Wreck Area of Historical Interest

The following other areas are protected under the National Trust Ordinance of 1992:

1. East Harbour Conch and Lobster Reserve;
2. Wades Green Proposed Area of Historical Interest; and
3. Little Ambergris Cay Proposed Nature Reserve.

None of the areas have been vested in the National Trust to date. Conch Bar Caves National Park and Cheshire Hall Area of Historical Interest are to be transferred in the near future.

The Trust is in the process of implementing a management plan – Plan for Biodiversity Management and Sustainable Development around Turks and Caicos Ramsar Site, prepared as part of a joint project between itself, the local communities, the United Kingdom (UK) Overseas Territories Conservation Forum and CABI Bioscience. The plan is intended to “provide the means by which the ... biodiversity and cultural heritage of the Caicos Islands can be treasured... without damage”, and makes proposals for the development of an “appropriate-scale eco-tourism industry.”

Policy for the management of Crown Land does not permit the lease of any of these areas for any purpose. A number of these are marine-based and might not be within direct impact range of land-based activities. However most are either on land, on the coast, or sufficiently close to be impacted, directly or indirectly, by land based activities. On some islands intense tourism activity takes place within the protected areas, for example, the Columbus Landfall Marine National Park on Grand Turk, and the Princess Alexandra Land and Sea National Park on Providenciales.

The Planning Department places strict controls in Protected Areas, allowing only the following types of development:

- National Parks – recreational and open land development; Commercial facilities accessory to the principal recreational or open land use;

- Nature Reserves – recreational development which is not detrimental to the surrounding area by reason of scale of the recreational activity, and open land development;
- Sanctuaries – minor site works or structures which are essential to the maintenance of the sanctuary, on condition that they are sited so as not to adversely affect any of the features of special environmental value or scientific interest; and
- Areas of Historic Interest – the protection of buildings, sites, and historic objects takes precedence over all other considerations; where repair or renovation works are proposed owners are required to preserve the original design.

Notwithstanding Crown Land and Planning Department policy, the Planning and Environment Sub-Committee for the current planning exercise has identified the following issues as being among several which militate against the effective protection of the resources:

- The fact that the protected areas are not included in the Crown Land bank and register;
- Developer pressure to extend development into protected areas and, in effect, privatise the resources; and
- Lack of access to the areas.

In this regard the Sub-Committee recommends the following:

- A terrestrial comprehensive exercise to be carried out to identify and map ecologically and scientifically important species and inform the national land use zoning plan;
- Re-visit of the designations in order to add new categories which require protection and to re-designate certain areas to ensure appropriate protection and control;
- Survey and registration of the protected areas, and their transfer to the National Trust; and
- Scoping to be carried out prior to the design of development in protected areas.

A review exercise carried out on existing and potential Ramsar sites in UK Overseas Territories and Crown Dependencies by the UK Overseas Territories Conservation Forum, and reported in April 2005 proposed the following:

- Extension of the existing Ramsar Site at North Caicos, Middle Caicos, and East Caicos to incorporate the western portion of the northern coast of Middle Caicos (including Fish Ponds, Crossing Place Trail, Indian Cave and Blowing and Juniper Holes); the area of forest between the settlements of Lorimers and Bambarra; the Conch Bar Caves National Park; and the East Bay Islands National Park on North Caicos; and

- Declaration of new sites at the Grand Turk salinas, ponds and shores; Salt Cay creeks and salinas; Turks Bank Seabird Cays; Caicos Bank Southern Cays; West Providenciales Wetlands; West Caicos saline lake and coral reef system; and Leeward-Going-Through Cays.

These proposed sites, as well as land within impact range of the resources which they contain, would also need to be excluded from the land to be considered for physical development purposes.

### **6.2.2 Built Development**

The phenomenal growth and redistribution of population and the lack of an up to date physical planning framework for the country have been manifested in a form of development that does not meet sustainable planning goals and objectives.

Several areas of Providenciales and Grand Turk display examples of spontaneous and haphazard development characteristic of larger unplanned and unregulated urban areas, while on the sister islands the large-scale out-migration that has taken place over the past few decades is evident in the number of abandoned buildings and blighted areas. Unauthorised development is a serious problem throughout the country, but particularly on Providenciales at Blue Hills, The Bight, Five Cays, and other low-income areas; and on Grand Turk in the Salina, Overback, and West Road areas.

The Director of Planning has identified several other problems and issues involved in shaping the built environment:

- Difficulty of having developers incorporate elements of local design into new development;
- The need for an aesthetic code to control the shape and design of the built environment and ensure an image that is compatible with the architecture and character of areas, such as Salt Cay, and the maintenance of the Caribbean ‘feel’;
- Inappropriate and unsustainable site development standards with respect to building height, setback from roads and boundaries, and the density at which land is to be developed; and
- The challenge of sustaining and protecting natural features such as sand dunes in heavily developed and trafficked areas such as Grace Bay.

Other issues to be addressed in this regard relate to the placement of structures in areas vulnerable to coastal hazards, and in such a manner as to alter natural beach processes and increase the risk of erosion and other hazards.

The Planning Department regulates the placement and design of structures through the application of standards including building height, density, and setbacks. Buildings along the coastline are also required to be elevated to treat with the potential for sea level rise.

### 6.2.2.1 Residential Development

Most of the land under built development is utilised for housing, mainly on single family plots ranging between one-quarter and one-half acre. The exception to this is on Providenciales where there is a predominance of multi-family development.

Surveys carried out for the 1999 Standard of Living Assessment and recorded in Tables 41 and 42 of the relevant report indicate tenure arrangements for residential accommodation throughout the country as shown in Table 10 below.

**Table 10: Residential Building Tenure, TCI**

Type Tenure	Percentage
Rented Private	53.8
Owned	38.9
Rent free	4.1
Rented Government	2.0
Leased	0.4
Squatted	0.3
Other	0.4

*Source: Standard of Living Assessment, 1999*

The surveys show that owner-occupied accommodation was the dominant form of tenure on all islands except Providenciales, and was highest on the most rural of the islands - Salt Cay with 71.4 per cent and Middle Caicos with 70.7 per cent. On North Caicos 59.3 per cent of households lived in their own homes, while on Grand Turk and South Caicos approximately one-half of the accommodation was owner-occupied. The owner-occupied category was only 29.7 per cent on Providenciales, where most of the accommodation (66.3 per cent) was rented from private owners.

With respect to the type of building utilised for residential purposes the dominant form of accommodation is classified as private, that is, the single-family dwelling house as shown at Table 11.

**Table 11: Housing Type, TCI**

Housing Type	Percentage
Private	43.0
Flat/ Apartment	33.7
Part Private	15.7
Townhouse	3.8
Double Duplex	2.7
Business and Dwelling	1.0

*Source: Standard of Living Assessment, 1999*

Salt Cay and Middle Caicos were again found to have very high percentages of their households occupying private buildings - 91.8 and 82.3 per cent respectively, while the housing stock on Providenciales included only 25.8 per cent of this type. With respect to North Caicos and South Caicos around 70.0 per cent of households were so classified and Grand Turk 62.6 per cent. Providenciales had the highest number of households -

approximately 48.6 per cent, in flats/apartments

The national findings are largely borne out by the Population and Housing Census 2001, which determined that a total of 3,486 households, 48.0 per cent of the total 7,254 in the country, lived in the private house. The Census classified most of the remainder as living in multi-family type housing including apartments and town house/condominium, duplexes, and barracks. At that time, Providenciales was found to have only 33.9 per cent of its households in the separate house.

The statistics for Providenciales might also be a reflection of the situation in areas such as the Bight and Five Cays, where chronic housing shortages have encouraged the unauthorised subdivision and subletting of dwelling units. The predominance of multi-family type development in Providenciales reflects the relatively urban character of that island in the same manner as the overwhelming use of the single family dwelling house on the other islands indicates their rural status.

The rapid pace of the development of the country in general, and Providenciales in particular, as well as high immigration rates has led to a shortfall in the supply of low-cost housing, and the result has been overcrowding, as suggested in the number of households containing more than four persons, squatting and generally substandard housing, particularly in the low-income settlements on Grand Turk and Providenciales.

The following table, adapted from the report of the Housing Sub-Committee, gives an indication of the condition of housing in the country generally, and on each of the island, as measured by the materials of construction and the availability of indoor sanitary and cooking facilities.

**Table 12: Housing Condition Indicators**

Particulars	Provi- denciales	Grand Turk	South Caicos	Middle Caicos	North Caicos	Salt	Total	%
<b>Material of Construction</b>								
Brick/Concrete	2,708	721	146	91	324	1	3,990	55.0
Wood/Brick	569	113	43	3	48	39	819	11.3
Wood	1,270	423	150	10	56	-	1,909	26.3
Other Materials	399	52	38	2	17	8	516	7.1
<b>Amenities</b>								
Indoor Plumbing	3,550	847	203	75	319	41	4,989	68.8
Outdoor or no kitchen	1,420	456	235	55	182	14	2,362	32.6
Flush Toilet	3,516	885	174	58	279	42	4,954	68.3
Pit Toilet	1,464	424	203	48	165	6	2,300	31.7

*Source: Housing & Population Census 2001 as quoted in the Report of the Housing Sub-committee (2006)*

The 1997 National Housing Policy identified the need for 202 new units annually for the ensuing 15 years to clear the then existing backlog, plus 95 upgrades and 54 repairs. Available information suggests that only 245 new units have been constructed in the interim. The Housing Sub-Committee estimates that only 25 per cent of projected need

has been met for a number of reasons, including high construction costs (approximately \$65,000 for a two-bedroom house and \$100,000 for a three-bedroom unit), and the fact that over one-half of the population are immigrants or expatriates on short-term contracts who add to the demand but are not in a position to contribute to the supply of housing.

The recommendation has been made for packaged housing or serviced lots in sites and services schemes to meet the demands of the lower income groups. To this end, the first affordable housing programme in the country was launched in February of 2006. The first phase of this programme is to be sited in the Blue Hills area and it is intended to be extended to Five Cays, Grand Turk, South Caicos, and the sister islands as demand dictates. The goal of the programme is to develop between 70 and 500 homes on an arrangement that includes the sale of plots of approximately one-quarter acre to prospective homeowners, and the construction of homes.

A feature of the residential land use on both Grand Turk and Providenciales is the large number of plots in approved medium to low density subdivisions including Breezy Brae, North Creek and The Ridge areas on Grand Turk; and Long Bay Hills, Chalk Sound, Juba Point, and Leeward on Providenciales which are fully serviced and vacant and which are therefore available to be developed for residential purposes. This reflects the disproportionate provision of housing for middle and higher income groups and the low 'take-up rate' in these areas.

The Housing Sub-Committee recommends the following measures to treat with the problems identified:

- Development and implementation of a Three-Year Housing Plan with an appropriate mix of housing units targeted to all segments of the population and particularly the lower and middle income categories;
- Greater accessibility to, and more efficient utilisation of, land;
- Conditional Purchase Lessees be allowed between three and six months to begin construction (as opposed to three years);
- A change from single-storey to multi-level structures;
- Improved institutional coordination and planning of the Housing Department to include development, management, and regulation of the housing sector in conjunction with other departments including Planning, and Lands and Surveys;
- A shift in the focus from mainly providing serviced lots to supporting more turn-key housing scheme developments for lower and middle income groups;
- The provision of stronger incentives to developers building approved lower and middle income housing such as reduced duty on the importation of construction materials and free Crown Lands with the land costs recovered from home buyers; and
- The strict enforcement of the law relating to slum conditions to ensure the improvement of housing conditions.

### 6.2.2.2 Tourism

Currently, Tourism is the most important economic activity in the country as reflected in statistics on employment and earnings. Of the 10,180 persons recorded in the 2001 Population and Housing Census as being in the labour force, employment in hotels, restaurants and Tourism accounted for 2,368 or close to one-quarter; and figures provided by DEPS indicate that in 2005 Tourism contributed 25.8 per cent to GDP.

Statistics provided by the Tourist Board and the TCI Hotel and Tourism Association (TCIHTA) and contained in table 2:11 of *Tourism Statistics* indicate that there was a total of 57 facilities in the country in 2004, of which 66.7 per cent (38) were classified as hotels, 17.5 per cent (10) as apartment/villas, and 15.8 per cent (nine) as guest houses.

The Tourism Resort Industry is concentrated on Providenciales with its base of 'sun, sea and sand'. Around 50 per cent (29) of the accommodation facilities (buildings) referred to in the statistics were located on that island, 17.5 per cent (10) on Grand Turk, while the remainder was spread among the other islands. Approximately 86.0 per cent of the rooms contained in these buildings were on Providenciales.

Since 2004, another 61 units, containing approximately 122 rooms are expected to have been completed on Providenciales (Hotel Amanyara and Grace Bay Club expansion). Other facilities due to be completed within the period of the Plan will result in 364 units (approximately 728 rooms) on Providenciales, 337 (674 rooms), 125 units (250 rooms) on West Caicos, and 116 units (232 rooms) on Grand Turk - a total of approximately 1,884 rooms.

The bulk of hotel rooms on Providenciales are contained in condominium hotels. These are almost all located along the coast, the main focus being Grace Bay, and the beach along this part of the island is considered to be approaching full capacity to the extent that the *Strategic Plan Review for TCI Tourism Draft Report* (Tourism Plan) suggests the imposition of a moratorium on the development of new accommodation facilities at this location.

Accommodation facilities on the other islands are also mostly located along the coast, and take the form of small hotels and guest houses. On Grand Turk a number of buildings of historical and architectural significance, such as the Turks Head Inn and Salt Raker Inn, have been converted for this purpose.

Other tourism infrastructure includes marinas at Leeward, Turtle Cove, Cooper Jack Bay and Long Bay Hills, and an 18-hole golf course, all located on Providenciales. A marina is under construction on the north-western coast of West Caicos.

A major recent development in the Tourism sector is the entry of the TCI into the Cruise Tourism market with the implementation of the cruise ship project on Grand Turk by Carnival Cruise Line in early 2006. This is expected to bring an average of two ships per day to the island, and has already begun to encourage the revitalisation of the local

handicraft industry, and prompt plans for the restoration of the historic assets on the island and hotel development to take care of the accommodation needs of return visitors.

Planning for the sustainable development of the Tourism sector, in particular, and the TCI, in general, requires:

- The determination of the right product mix and the optimum location of tourism plant in light of infrastructural deficiencies and requirements;
- Consideration of the potential social impact on the smaller communities on the sister islands, and the environmental impact (direct and indirect) on the fragile coastal and marine environment; and
- Attention to the required support facilities such as housing for workers.

### *6.2.2.3 Commercial and Office Use*

Commercial and office uses are not highly consumptive of land, but need to be provided for in accordance with the needs of the population and the economy, at locations strategic to the catchment areas.

Commercial activity is located on all of the islands. The higher-order retail services, including large appliances and hardware and building materials, are based mainly on Providenciales in the Downtown area and along the Leeward Highway, and to a lesser extent on Grand Turk in the Cockburn Town, and Salina areas. Only the most basic lower-order goods are available on the other islands.

The Offshore Financial Services sector comprises mainly Banking, Insurance, and Trust Management services. The industry has been in decline as evidenced by the decrease in the number of companies registered from 21,541 in 2000, to 17,496 in 2005. These services are accommodated at Cockburn Town in Grand Turk. All of the head offices of Government are also sited on Grand Turk at South Base, and the general Cockburn Town area including the Government Office Complex at Pond Street.

Providenciales is, however, considered to be the commercial and business centre of the islands, and this status is reflected in the location of offices in Downtown and along the Leeward Highway, and as part of Tourism complexes. The Tourism sector has generated a large number of financial institutions including banks, as well as insurance, real estate, and surveying agencies which are housed at these locations. There are also an increasing number of Government branch offices on the island.

There are modern office blocks on South Caicos and North Caicos containing the offices of the District Commissioners and the Chief Minister.

Development projected to take place in the Tourism sector over the period of the plan can be expected to impact the need for land, at suitable locations, for commercial and office use on all of the islands.

#### *6.2.2.4 Industrial*

Industrial activity comprises a small component of the economy, contributing only 1.2 per cent of GDP in 2005 according to the DEPS. This would include five fish processing plants, three of which are located on Providenciales, and two on South Caicos processing mainly conch and lobsters; and a sugar packaging plant on Grand Turk. Other industrial activity in the TCI is limited to small areas on Providenciales that cater to the Tourism and construction sectors, and range from heavy block-making operations at South Dock to cabinet making in the Providenciales Industrial Park.

Demand for industrial land will be influenced by plans for economic diversification, including the development of an agro-industrial sector and diversification of the fisheries sector to include expansion of maricultural/aquacultural activities.

#### *6.2.2.5 Physical and Social Infrastructure*

The main physical infrastructural facilities that utilise land in the country are the airports on all of the islands; international shipping ports on Grand Turk, South Caicos, North Caicos (under construction) and Providenciales; domestic shipping ports at Salt Cay and Middle Caicos; and roads ranging from the divided highway on Providenciales to unpaved alignments on the sister islands.

Water and sewerage infrastructural facilities comprise mainly Reverse Osmosis and desalination plants on Grand Turk and Providenciales, and packaged sewage treatment plants attached to the large hotel and condominium complexes on Providenciales. Land devoted to solid waste disposal is confined to a dump on each of the islands.

The major social facilities in the country are the General Hospital, Geriatric Care Facility, Police Headquarters, Prison, Community College, and Business College on Grand Turk; Boston University School for Field Studies, and the Wellness Centre on South Caicos; Sports Complex and Health Complex on Providenciales; health care clinics and primary schools on all of the islands; and secondary schools on all except Salt Cay and Middle Caicos.

#### *6.2.2.6 Emergency Shelters*

There are emergency shelters on all of the islands, usually contained within schools and other public buildings, some of which are not ideally suited or located for the purpose.

### **6.2.3 Agriculture**

The 2001 Population and Housing Census indicates that only 84 persons, or 0.6% of the labour force, were at that time employed in the agricultural sector. This figure is understood to include persons engaged in landscaping. According to statistics provided by the DEPS the combined contribution of the agriculture and Fisheries sectors to GDP varied between 0.8 and 1.3 per cent between 2000 and 2005, and in 2005 was 1.1 per cent. These statistics are reflective of the very limited acreage that is devoted to agriculture.

Agricultural activity is severely constrained by the insufficiency and unreliability of the rainfall, particularly on the Turks Islands; the poor quality of the soil; transportation limitations; and difficulty in obtaining labour. As a consequence, since the abandonment of cotton and sisal cultivation in the Caicoses, agricultural activity is confined to small-scale activity undertaken almost exclusively on Middle Caicos and North Caicos where fruits and vegetables are grown mainly for domestic consumption.

There is on North Caicos a central demonstration plot growing a variety of fruits and vegetables. This is surrounded by plots of two to three acres that are intended to be leased to qualified farmers. There are plans to extend this arrangement to Middle Caicos.

There are potable groundwater lenses at Kew and Bottle Creek on North Caicos, and at Conch Bar and Durham Wells on Middle Caicos at depths ranging from three to 20 feet which are capable of supporting bananas and other tree crops, pumpkins, melons, and cucumbers.

The only other agricultural activity of any note is undertaken on small plots in the Malcolm Road area of northwest Providenciales and a small hydroponics farm which is also located on that island.

#### **6.2.4 Fisheries**

The Fisheries sector provides another important source of employment and income. The 2001 Population and Housing Census reports 153 persons close to 1.2 per cent of the labour force, to be engaged in fishing and fish farming.

There is a 61-hectare conch farm on Providenciales which serves, as well, as a major attraction for visitors to the TCI.

The main Fisheries infrastructure in the country is a major fishing port located at Cockburn Harbour on South Caicos; and landing, handling and processing facilities at Five Cays and South Dock on Providenciales.

### ***6.3 Commitments to Development (Development Permissions and Building Permits)***

An indication of commitments to development, as determined by proposals granted Development Permission and Building Permits by the Department of Planning, provides a reliable guide as to the locations at which development is almost certain to occur in the future, and the quantum of such development.

An examination of the records of the Department for the period January 01, 2001 to March 17, 2006 (Table 13) reveals that over 70 per cent of the number of applications received over the period have been for development on Providenciales, and that a significant percentage of these relate to Tourism and Tourism-related development.

Over the period, Development Permissions and Building Permits were granted for approximately 2,000 bedrooms on the island, contained in condominiums, hotels and villas, some of which have already been constructed. The records show a significant increase in the number of applications received for Providenciales over the past ten years, from 280 in 1995, to 570 in 2005.

In contrast, there are few commitments to major developments on the other islands as reflected in applications approved over the period.

**Table 13: Applications submitted to the Department of Planning, January 01, 2001– March 17, 2006**

<b>Island</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006*</b>
Grand Turk	75	73	105	98	131	37
Salt Cay	8	6	4	7	8	1
South Caicos	11	14	8	15	28	3
Middle Caicos	5	5	5	5	5	1
North Caicos	18	26	25	49	37	9
Providenciales	438	413	408	463	570	127
West Caicos	4	0	4	6	1	0
Parrot Cay	8	6	14	5	0	2
<b>Total</b>	<b>567</b>	<b>543</b>	<b>573</b>	<b>648</b>	<b>780</b>	<b>180</b>

*\*To March 17, 2006*

There has also been a significant increase in the number of applications submitted for Grand Turk, from 57 in 1995, to 131 in 2005. Major applications approved for the island are:

- The Cruise Terminal which has essentially been completed, and a Welcome Centre on which construction is significantly advanced;
- Cacique Royal Hotel and Condominiums containing 116 units (232 rooms) and a restaurant;
- Columbus Landing luxury condominium development; and
- Sailview Resort 'marina village', including condominiums and villas, and a 250-slip marina.

With respect to Salt Cay and South Caicos, there was no significant difference in the number of submissions made annually since 1995. There is one major application recorded for Salt Cay, relating to the erection of cottages at North Bay, but a decision has not yet been taken on this proposal.

Development proposals approved for South Caicos include the East Bay Hotel containing 96 rooms on which construction is underway. A submission by Caicos Beach Resort for a Resort and Marina on the island has not yet been determined. The 500-room High Point Development (Caicos Marina and Beach Resort) for which permission was granted over 20 years ago remains incomplete to date.

The numbers of applications submitted for Middle Caicos remained fairly even since 1995, and do not include any major development projects.

There has also been a significant increase in the submissions for North Caicos from 18 in 1995 to 37 in 2005. Approved developments on the island include:

- The St. Charles Resort Condominium development, a total of 122 units (approximately 244 rooms), which is currently under construction on Horsestable Beach; and
- Royal Reef Resort in the Sandy Point area, containing a total of 215 units (approximately 430 rooms) in condominiums and a hotel building on which construction is scheduled to start soon.

Outline Development Permission has also been granted for dredging and reclamation to create a marina basin and canals at Sandy Point. Another major project submitted and granted Development Permission for North Caicos – and including the creation of 630 residential plots, a marina and golf course on 1,700 acres of Crown Land incorporating Bay Cay, East Bay Cay, and Major Hill Cay off the East Coast – appears to have been shelved.

All submissions relating to West Caicos are by Logwood Development Company Limited, and include a boat basin, runway, taxiway, hotel, and subdivision of land to be undertaken pursuant to a Development Agreement signed with the TCI Government (TCIG) for the development of a 296-acre parcel on the island.

The applications for Parrot Cay relate to development proposals by Caicos Holdings Limited and Parrot Cay Development for resort-related development.

#### **6.4 Commitments to Development (Development Agreements)**

Other significant projects which have not yet been submitted for Development Permission but which have been committed by way of Development Agreements and/or Executive Council approval of structure-type plans are:

- Middle Caicos – Development Agreement signed 2005 between the Crown and the TCIG and Mare Bello Limited with respect to development of approximately 1,000 acres of land to include residential development, marina, golf course, shops, boutique style hotel, walking trails and a school;
- West Caicos – 10-year West Caicos Development Plan prepared June 2003 by Logwood Development Company Limited, and approved by the Executive Council, which makes provision for a marina, which has already been completed as part of a proposed Harbour Village, a hotel and condominium hotel, 235 residential lots, a high density condominium apartments, and a 2,600 foot airstrip; and

- Providenciales - North-West Point Sustainable Master Plan prepared in accordance with a 1999 Development Agreement between Caicos Resorts Limited and the TCI Government, that will result in development that includes a total of 392 townhouses/apartments and 609 single family homes, a resort hotel on a 65-acre site, an 18-hole golf course, an eco-lodge, and commercial and civic centre containing a school and entertainment and recreational facilities.

The Tourism Plan makes mention of a 150-room Tucker Hill development and the Long Bay Beach Estate Project in Middle Caicos, and indicates that the total number of rooms in hotels, condominiums and villas outside of Providenciales may be as high as 2,000 in the ensuing five year period.

## 7.0 CURRENT PHYSICAL PLANNING FRAMEWORK

### 7.1 *National Physical Development Plan (NPDP) 1987-1997*

Development proposals are determined by the Department of Planning based upon zoning in the NPDP prepared in 1987 in accordance with the Physical Planning Ordinance.

Under the Plan, the National Parks, Nature Reserves, Sanctuaries, and Areas of Historic Interest established in accordance with the National Park Ordinance (1989) were so designated, affording them further protection. The salinas were treated as Conservation Areas.

The plan for Providenciales zoned almost all of the land in the centre and east of the island (east of the 'Stammer Line') for development purposes, and Plan allocated all of the land along Grace Bay, Long Bay, the Leeward Going Through Channel and Cooper Jack Bight, as well as small sections of Northwest Point for Tourism – hotels, condominiums, and holiday homes. The remainder of the land was zoned as follows:

- Low density residential in the area along the north coast stretching from Cove Point to Long Point, Chalk Sound peninsula, and sections of the Grace Bight/Leeward Blocks, Juba, and Long Bay Hill;
- Medium and high density residential and apartments in The Bight, Blue Hills, Downtown, Five Cays, Kew Town and Wheeland areas; and
- Commercial development in the existing Downtown area and land adjacent and to the north. Further commercial development was intended to take place in linear form along much of the Leeward Highway.

The relative insignificance of industrial activity to the economy was reflected in the very limited provision made for this sector – at South Dock, on lands between the airport and Five Cays, and in the Cheshire Hall Area.

Similarly, no provision was made for agricultural activity on the island.

Large portions of the land on Grand Turk were excluded from development because of the policy to retain the salinas to function as storm water impoundment devices. Most of the developable land was zoned for medium and high density residential purposes, with a few areas of low density development in the North Creek, The Ridge, and South Base areas.

Zoning maps for the other islands have not been available for the purpose of this analysis.

The plan has generally been followed except that rezoning has taken place in recognition of the altered circumstances since its preparation and approval in 1987, and mainly to

facilitate the approval of Tourism resort development in areas not allocated in the Plan for that purpose.

## *7.2 Sustainable Development Planning Initiative (SDPI)*

The SDPI is an initiative by the Department of Planning to prepare plans for the sustainable development of the TCI. The first of these was for the island of Grand Turk, and was titled Sustainable Development Planning Initiative Grand Turk Island Phase II, TCI.

This plan, prepared in 2002, was based on a number of goals including the protection of natural resources, and aimed at achieving a balance between economic, social, and environmental considerations. The exercise was intended to produce a zoning scheme which would provide the framework within which individual development proposals could be evaluated.

The plan proposed the adaptive re-use of existing buildings in order to ensure the full utilisation of the building stock, and pointed to the need to optimise the utilisation of land in residential subdivisions such as Breezy Brae, North Creek and The Ridge. The official status of this Plan is to be determined.

The 10-year West Caicos Development Plan described in Section 6.4 of this report was also prepared within the context of the SDPI.

## 8.0 FACTORS INFLUENCING FUTURE DEVELOPMENT

### 8.1 *Developmental Goals and Imperatives*

There are a number of goals and imperatives on which there is widespread agreement, and which will influence the future of the economy and, hence, the distribution of population, the pattern of settlement across the country, and the manner in which land is utilised. The following have been articulated in the various policy documents and official pronouncements:

- The need to address existing economic inequities between geographic areas, and achieve a more balanced spread of development among the islands;
- The necessity of forging linkages between the Tourism, Fisheries, and Agricultural sectors of the economy;
- The resolve to empower Belongers to play a more active role in the economic and social development of the country; and
- The need to protect the population from natural hazards.

### 8.2 *Policy Factors*

Policies and/or plans have been prepared for a number of sectors of the economy as well as for the management and utilisation of Crown Land. Some of the policy statements referred to below might not yet have been formally agreed to or officially adopted. In addition, some are based on oral communication and need to be considered, notwithstanding that they might not have been converted to official policy.

#### 8.2.1 *Environmental Policy*

The Environment Charter, signed by the TCI in 2001, was an undertaking to integrate environmental considerations into all aspects of policy planning and implementation.

Guidelines have been developed for a strategy for action to implement the Charter and adopted in 2003 by the Executive Council. These commit to ensuring:

- The protection and restoration of key habitats, species and landscape features by, *inter alia*, protecting, managing, improving and extending the Protected Areas System established under the National Parks Ordinance; protecting and, where necessary, restoring key habitats including coastal areas, wetlands, the salinas and woodlands; and protecting important species of flora and fauna;
- The integration of environmental considerations into economic and social planning processes; and
- The promotion of sustainable patterns of production and consumption within the territory by the implementation of planning processes which integrate

economic, social, and environmental needs and ensure an equitable spread of the benefits of development.

Among the strategies for action to achieve the aims of the Charter is the preparation of a ten-year Comprehensive Development Plan aimed at achieving the sustainable development of the TCI.

### 8.2.2 Crown Land Policy

One of the recommended objectives of Crown Land Policy as outlined in the relevant report is to establish advantages for the Government in the utilisation of Crown Land to direct the pace of growth on Providenciales, and influence the nature and timing of development on the sister islands. Another objective is to promote sustainable economic, social, and environmental development by facilitating the provision of adequate land on which affordable housing for residents can be constructed.

The policy also recommends the following, which bear relevance to the physical development of the country given the large expanse of land owned by the Crown:

- Discontinuation of the practice of disposing of Crown Land for large scale commercial development as a means of generating revenue to meet budget shortfalls;
- Management of Crown Lands based on an integrated land use planning framework that serves as a guide to the future sustainable development of the country;
- Improvement of the capability of the Department of Planning to enforce Planning Regulations regarding the development of Crown Land;
- Early review and comment by the Planning Department with respect to large scale commercial developments prior to the finalisation of lease agreements;
- Incorporation of land use planning regulations into the long-term lease agreements relating to large scale commercial developments;
- Protection of significant ecological or historic areas from future development;
- Acceleration of the preparation and completion of a new NPDP;
- Imposition of a “real-property based infrastructure levy on the unimproved value of real property owned by Non-Belongers” as a means of stopping speculative practices and reducing the underutilisation of land by these persons; and
- Utilisation of discounted long-term lease agreement to stimulate commercial development in areas not currently in demand for new development.

Government also proposes the development of a framework for allocation of Crown Lands in such a manner as to ensure the proper planning of new settlements and the creation of viable communities.

### 8.2.3 Transportation Policy

One of the objectives of transportation policy as contained in the Transport Sector Policy of February 2006 is to spread development and the benefits of economic growth to the less developed islands; give support to, and accommodate, further growth of the Tourism industry; and generally to meet the demand for transportation facilities between and within the islands.

Proposals for a number of infrastructural developments will impact the manner in which the islands are developed economically, socially and physically. The most significant of these are:

- The construction of a 1.5-mile causeway linking North Caicos and Middle Caicos – the first phase of a Spine Link project to connect the Caicos Islands – which is expected to spur the growth and development of the two islands as one economic unit;
- Airport expansion, rehabilitation, and improvement works which involve on Providenciales the extension of the runway and expansion of the terminal facilities; On South Caicos, North Caicos and Middle Caicos airport development/upgrade;
- Improvement of road networks on all of the islands, at subdivisional and higher levels;
- Construction of an international shipping port with draft of 11 feet currently underway at Bellefield in North Caicos and expected to be completed during 2007; and
- Redevelopment of South Dock on Providenciales.

All but the Providenciales airport expansion have been listed among priority projects to be undertaken or started during the 2006/2007 fiscal year, and funds have been allocated accordingly.

### 8.2.4 Housing Policy

In 2003 the country's Chief Minister gave an undertaking that TCIslanders would have access to a plot of Crown Land for residential purposes. Provision therefore needs to be made for land for housing, including via sites and services-type projects, to meet the needs of lower-income and other families, particularly on Grand Turk and Providenciales, and for support health, educational, and recreational facilities. (Freddi, sites and services - the option to packaged housing

The 2005/2006 Budget Address included the announcement of a proposal for a Government Subdivision Infrastructure Development Fund with respect to Crown Land leases granted for subdivisions without infrastructure, intended to provide for the installation of infrastructure and services in residential subdivisions and, consequently, to increase the 'take-up rate' of Crown Land leases.

Projects listed in the 2006/07 budget address include a Low Income Special Mortgage for which \$1m is to be expended during the current financial year. Arrangements were also announced for more than \$3m in additional mortgage lending as well as an investment of over \$500,000 in housing programmes to be undertaken through TCInvest.

### 8.2.5 Tourism Policy

Policy outlined in this section is based mainly on the recommendations contained in the Tourism Plan.

The need has been expressed to diversify the industry from reliance on the sun, sea, and sand product by exploiting the other natural resources on which the slogan 'Beautiful By Nature' is founded, as well as the historical assets and character of each island unit. This will allow the country to tap into the potential niche markets for nature and heritage tourism, as well as cultural tourism.

This product diversification will have the effect of promoting geographic diversification and aiding the achievement of the objectives of equity and balance by spreading the benefits to be derived from the industry to the sister islands. This is expected to promote small entrepreneurial endeavour and, thus, facilitate and encourage the involvement of the Belonger community in the Tourism sector.

The 2006/07 Speech from the Throne indicated the commitment of the Government to promoting the deepening and diversification of the tourism sector by "*opening other islands to development through new and more imaginative investment initiatives, and by exploring non-traditional markets such as Asia and Eastern Europe...*"

Table 14 lists the Tourism product proposed to be developed for each of the islands, and a number of the proposals contained in the Tourism Plan.

### 8.2.6 Policy Affecting Commercial and Office Use

Government has committed to the revitalisation of Grand Turk so that it can properly function as the administrative and cultural centre of the country. The island, therefore, will continue to be the location of Government Head Offices. The island is also expected to continue, during the period of the Plan, to be the main base of the Offshore Financial Services Industry.

Branch offices of some government agencies and the offices of the District Commissioners will continue to be located on the other islands. Listed in the 2006/07 budget among priority projects to be undertaken during the year is a Government office block on Middle Caicos.

**Table 14: Tourism Potential by Island**

Island	Type	Products, Resources, and Plans
Grand Turk	Heritage Tourism  Eco Tourism Cruise Tourism 3Ss Tourism Dive Tourism Whale Watching	Heritage superstructure and infrastructure – restoration and enhancement of relics of the salt industry – historic buildings on Front Street in Cockburn Town in particular, monuments, industries, Gun Hill/South Creek Project. Natural vegetation, variety of habitats in South Creek National Park.  Cruise facility and Welcome Centre; major arts and craft display centre proposed. Excellent beaches at Pillory Beach, Governor’s Beach. Reefs. Passage of whales during winter months.
Salt Cay	Heritage Tourism 3Ss Tourism Dive Tourism Whale Watching	Historic buildings including the White House, Brown House, Anglican Church, salinas. Excellent beaches. Reefs. Passage of whales during winter months (Benefit from development of Grand Turk based on plans to develop Grand Turk, Salt Cay and South Caicos “as a unit depicting the era of the salt industry” based on the restoration and adaptive re-use, as hotels and restaurants, of the heritage buildings from that period).
South Caicos	Heritage Tourism Eco Tourism 3Ss Tourism Dive Tourism Whale Watching Sports Tourism	Historic buildings in Cockburn Harbour, salinas, Boiling Hole. Large flocks of flamingos, ospreys and pelicans. Excellent beaches. Reefs. Passage of whales during winter months. South Caicos Regatta. (Plans for tourist facilities to be opened in 2008 – restaurant and visitor centre)
Middle Caicos	Eco Tourism  3Ss Tourism Whale Watching	Largest nature preserve in the Caribbean, including flamingo and frigate bird colonies; largest cave network in northern Caribbean. Five-mile coastal Crossing Place Trail. Excellent beaches. Passage of whales during winter months.

Island	Type	Products, Resources, and Plans
North Caicos	Heritage Tourism Eco Tourism  3Ss Tourism	Wades Green Plantation Ruins. Wildlife – ospreys, flamingos and other sea and wading birds; viewpoint at Whitby for flamingos. Several Nature Reserves - Cottage Pond, Bellefield Landing Pond, Pumpkin Bluff Pond, Three Mary Cays Sanctuary, Lucayan caves at Sandy Point, Pumpkin Bluff, Whitby. Excellent beaches at Horstable Beach, Pelican Point, Whitby. (Plans for tourist facilities including tour stopover to be opened in 2008).
Providenciales	3Ss Tourism Dive Tourism Deep sea fishing Bonfishing	Excellent beaches along Grace Bay, Long Bay, and elsewhere. Reefs. Recreational fisheries resources.
West Caicos	Will be developed	in accordance with the 10-year West Caicos Development Plan as approved by the Executive Council.

Providenciales will continue to attract services linked to the Tourism sector.

### 8.2.7 Agriculture and Agro-processing Policy

Land use planning for the agricultural sector would need to be guided by the agricultural policy outlined in the document *Towards an Agricultural Policy for TCI 2004* (Agricultural Policy) and the Provisions of the Agricultural Lease Agreement. It should be informed, as well, by the recommendations of the Agricultural Sub-Committee (ASC) for the preparation of the Framework which reported in January of 2006.

#### *8.2.7.1 Towards an Agricultural Policy for TCI*

This document, produced in June of 2004, outlines prescriptions aimed at increasing output, income, and employment, replacing a significant portion of imports, and creating linkages with other sectors of the economy by “bringing more lands into production in a systematic way.”

The policy for import substitution of foodstuffs aims at replacing 20 per cent of imports in twelve years, and includes proposals for hydroponics to produce vegetables such as tomatoes and lettuce in the water scarce environment that is the TCI. Emphasis is to be placed on the cultivation of fruits which are in demand in the Tourism industry and those which can be processed to produce jams, jellies, juices, liquors, wines, and sauces.

The recommendations contained in the policy document assume the availability of approximately 15,000 acres of land made up as follows:

- 5,120 acres on North Caicos allocated for this purpose in the NPDP;
- 7,860 acres on Middle Caicos; and
- 2,000 acres from other islands and backyard gardens.

The policy-makers also suggest the establishment of a plant nursery, piggery and small chicken hatchery, and recommend that Government promote the concept of a ‘viable family farm’ based on five- to 10-acre plots, and assist with the outfitting and establishment of 10 to 20 such units each year, for a total of 100 to 200 farms over the ensuing 10-year period.

The promotion of the agricultural sector as suggested will create opportunities for agro-processing activity. In this regard the document suggests the establishment of processing plants for fruit and vegetables, as well as modern slaughtering and processing facilities on Middle or North Caicos, or both.

#### *8.2.7.2 Agricultural Lease Agreement*

Strategies in the Agriculture Lease Agreement (2005) to ‘kick-start’ and develop the agricultural industry in Middle and North Caicos are based on an approach which involves

- The establishment of demonstration plots to facilitate the introduction of modern technologies and to provide training to farmers; and
- The development of Crown Lands in Pine Yard, Kew and Conch Bar to be leased with the required support infrastructure to farmers on a five-year basis.

Infrastructure is to include animal housing units, wells, roads, electricity, and processing facilities.

### *8.2.7.3 ASC Recommendations*

The ASC recommends that the agricultural policy in TCI aim at replacing 30 per cent of food imports by 2016, and that:

- In the short term the model farming project on North Caicos should have 10 to 12 farmers settled on the land by April 2006 and be replicated on Middle Caicos by September 2006.
- In the medium term the Government encourage the establishment of homestead plots by locals; facilitate the involvement of foreigners in the sector in partnership with TCI Islanders utilising Crown Land leased from the Government; and, by end 2008, develop a model for the rearing and processing of chickens, pigs and goats on a commercial basis, and establish plant nurseries for the propagation, distribution and sale of orchard tree crops which can form the basis of a fruit-processing industry.

### 8.2.8 Fisheries Policy

Policy for this sector, as enunciated in the Policy for the Management and Development of the Fisheries Sector prepared by the TCIG Ministry of Natural Resources (Department of Environment and Coastal Resources - DECR) in 2005, is based upon the commitment of the Government to ensuring the effective and sustainable utilisation and management of the Fisheries resources of the country, and to promoting diversification within the marine Fisheries industry.

Under this 2005 policy, maricultural and aquacultural activities are viewed as “effective tools to alleviate the pressure on the natural Fisheries resources and generate additional employment and incomes.” Previous to this, the 2004 Agricultural Policy document had recommended the utilisation of the following resources for fish farming subject to proper assessment of the environmental impacts of such activities:

- Marine wetlands;
- 1000 acres of land formerly used as salinas; and
- Inter-tidal banks and flats.

A Marine Fisheries Management Plan is to be developed as the means of implementing the policy. The Vision for this Plan is “a healthy marine environment that sustains the livelihoods and aspirations of the people of the TCI for generations,” and among its

biological goals is the minimisation of the impacts of fishing on the natural environment including fish habitats, nurseries, and spawning areas. The plan is also intended to promote the “mariculture/aquaculture of indigenous species of invertebrates and fish as a means of diversifying income and diet.”

The ASC recommends that conch, lobster, and crabs be the focus of local aquaculture production based upon a study of the feasibility of producing these species of fish.

South Caicos is expected to continue to be the main centre of the Fisheries industry based upon its current success in the exploitation of conch and lobster. The island will also be the focus of plans for diversification into deep sea fishing. Processing facilities already on the island will strengthen the case for the further development of a large scale fishing industry on the island.

## 9.0 CONCLUSION

Following is a listing of the main activities on which the development of the various islands is to be based over the medium term:

- Grand Turk - Administrative Capital;  
Home of the Offshore Financial Industry; and  
Tourism: Heritage, Eco-tourism, Cruise, Sun-Sea-Sand (3Ss), Dive, Whale Watching
- Salt Cay - Tourism: Heritage, SSS, Dive, Whale Watching.  
(UNESCO is giving consideration to declaring the island a World Heritage Site).
- South Caicos - Fishing Capital;  
Fish processing; and  
Tourism: Heritage, Eco-tourism, 3Ss, Dive, Whale Watching.
- Middle Caicos - Tourism - Heritage, Eco, 3Ss;  
Agriculture; and  
Agro-processing.
- North Caicos - Tourism: Heritage, Eco-tourism, 3Ss;  
Agriculture; and  
Agro-processing.
- Providenciales - Tourism - 3Ss, Dive, Deep sea fishing, bonefishing, snorkelling;  
Commercial and Offices.
- West Caicos - Tourism: 3Ss.

There are a number of challenges to be met in exploiting the economic base of each of the islands in securing the sustainable development of the TCI. One of the greatest of these is protecting the fragile coastal and marine environment - including the wetlands and reefs - from the impact of the activities which are proposed and likely to take place on the land, in particular tourism, agriculture, agro-processing and fish processing.

The physical planning component of the Framework will attempt to rise to the challenges and find the right balance between development and environmental protection, and to make proposals for the distribution of land between the competing uses in such a manner as to obtain maximum efficiency of this valuable resource.

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## **APPENDIX: MAPS**