



ECONOMIC AND SOCIAL SURVEY JAMAICA 2020





ECONOMIC AND SOCIAL SURVEY **JAMAICA 2020**



**PREPARED BY THE
PLANNING INSTITUTE OF JAMAICA**



Published by the Planning Institute of Jamaica
16 Oxford Road
Kingston 5
Jamaica W.I.

Telephone: (876) 960-9339
Fax: (876) 906-5011
e-mail: info@pioj.gov.com
website: www.pioj.gov.jm

1957-1972 published as: Economic Survey Jamaica
Published by the Institute under its former names:
Central Planning Unit, National Planning Agency

NATIONAL LIBRARY OF JAMAICA CATALOGUING-IN-PUBLICATION DATA

Name: Planning Institute of Jamaica.
Title: Economic and Social Survey Jamaica 2020 / prepared by the
Planning Institute of Jamaica.
Description: Kingston : Planning Institute of Jamaica, 2020.
Identifiers: ISSN 0256-5013
Subjects: LCSH: Jamaica – Economic conditions. | Social surveys –
Jamaica. | Jamaica – Statistics.
Classification: DDC 330.97290605 -- dc23.

Compiled and typeset by the Corporate Marketing and Communications Division of the
Planning Institute of Jamaica
Printed by

Cover photographs courtesy of: National Environment and Planning Agency; The Ministry of Transport and Mining
The Scientific Research Council; and Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica

Copyright © 2021 by
Planning Institute of Jamaica
All rights reserved

Published July, 2021

Annual subscription

Jamaica:	J\$3 000.00	
USA, Canada and the Caribbean Area:	US\$70.00	Air mail
UK and the Rest of the World:	US\$75.00	

TABLE OF CONTENTS

Foreword.....v

Acknowledgements.....viii

Selected Indicators.....ix

OVERVIEW.....xiii

THE INTERNATIONALECONOMY.....1.1

OFFICIALDEVELOPMENT ASSISTANCE.....2.1

SUSTAINABLE DEVELOPMENT

Sustainable Development.....3.1

Science, Technology and Innovation.....4.1

THE MACRO ECONOMY

Gross Domestic Product.....5.1

Balance of Payments and External Trade.....6.1

Money and Inflation.....7.1

Fiscal Accounts8.1

Finance & Insurance Services.....9.1

SECTORAL PERFORMANCE

Agriculture10.1

Mining and Quarrying11.1

Manufacturing.....12.1

Micro and Small Enterprises.....13.1

Construction14.1

Energy, Electricity and Water15.1

Transport, Storage and Communication.....16.1

Hotels and Restaurants.....17.1

Entertainment and Sport.....18.1

Wholesale & Retail Trade; Repair and Installation of Machinery.....19.1

DEMOGRAPHICS AND THE LABOUR MARKET

Population.....20.1

The Labour Market.....21.1

HUMAN DEVELOPMENT, SOCIAL PROTECTION AND CULTURE

Education and Training22.1

Health.....23.1

National Security and Justice.....24.1

Social Development, Social Protection and Culture25.1

INDICES AND APPENDICES

List of Tables

List of Figures

Abbreviations and Acronyms

Glossary of Terms

Index

THE 2030 AGENDA SUSTAINABLE DEVELOPMENT GOALS

- GOAL 1.** End poverty in all its forms everywhere
- GOAL 2.** End hunger, achieve food security and improved nutrition and promote sustainable agriculture
- GOAL 3.** Ensure healthy lives and promote well-being for all at all ages
- GOAL 4.** Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
- GOAL 5.** Achieve gender equality and empower all women and girls
- GOAL 6.** Ensure availability and sustainable management of water and sanitation for all
- GOAL 7.** Ensure access to affordable, reliable, sustainable and modern energy for all
- GOAL 8.** Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all
- GOAL 9.** Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- GOAL 10.** Reduce inequality within and among countries
- GOAL 11.** Make cities and human settlements inclusive, safe, resilient and sustainable
- GOAL 12.** Ensure sustainable consumption and production patterns
- GOAL 13.** Take urgent action to combat climate change and its impacts
- GOAL 14.** Conserve and sustainably use the oceans, seas and marine resources for sustainable development
- GOAL 15.** Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
- GOAL 16.** Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
- GOAL 17.** Strengthen the means of implementation and revitalize the global partnership for sustainable development

FOREWORD

The year was a challenging one, as in the local and global sphere, countries grappled with the effects of the Coronavirus Disease 2019 (COVID-19), which severely affected the health sector and disrupted global output and labour markets. Real Gross Domestic Product, recorded at \$703 543.0 million (a 9.9 per cent decline) was at its lowest level since 2002, reversing the trend of growth previously in place. This lower level of output, the largest decline on record, was the direct result of the COVID-19 pandemic and measures implemented to slow its spread, which resulted in an economy-wide contraction. The Services Industry felt the greater impact, declining by 10.9 per cent, while the Goods Producing Industry declined by 4.5 per cent—all industries contracted, with the exception of Producers of Government Services. The low economic performance was a result of the temporary border closures; curfews, which curtailed productive hours; and limitations on the size of gatherings, which restricted activities related to entertainment and dining out.

The labour market, with an average of 1 314 033 persons, decreased by 34 967 persons relative to the previous year. This decline in the labour force led to an increase of 772 233 persons outside the labour force. There was a reduction in the number of persons employed, by 2.6 per cent. The unemployment rate averaged 10.2 per cent with a record level of job losses, averaging 135 800 persons. The youth unemployment rate increased to 21.1 per cent in comparison with 20.6 per cent in 2019.

With respect to Entertainment & Sports, the Other Services industry—of which the Recreational, Cultural and Sporting Activities (RCS) sub-industry represents the largest share—Real Value Added (RVA) recorded a decline of 23.5 per cent. The measures implemented to stem the spread of COVID-19 had a negative impact on the performance of the industry as it led to the cancellation of a number of entertainment and sporting events, as well as a decline in tourist-related activities.

The Construction industry contracted by 0.8 per cent, representing the second consecutive year of decline. The performance reflected the general contraction of the economy, stemming from a reduction in the Building Construction category, which outweighed an increase in the Civil Engineering category. Decreased activities associated with residential buildings, hotels and commercial office space led to the contraction in Building Construction. The completion of several major road infrastructure projects and the delayed construction

of residential and commercial buildings resulted in a reduction in production and sales of some construction inputs.

Adverse weather conditions had a negative impact on the Agriculture, Forestry & Fishing industry and hampered agricultural output. RVA for the industry contracted by 1.4 per cent relative to 2019 and contributed 7.8 per cent to Total Real Value Added. As indicated by the PIOJ's Agriculture Production Index (API), the declines in Traditional Export Crops, Animal Farming and Fishing outweighed an increase in Other Agricultural Crops. The reorganization of the government's Production and Productivity Programme to facilitate the swift recovery of the agricultural sector led to the prevention of a further decline. The sector benefited from funding support to priority initiatives to include: a Buy-back Programme; subsidies and incentives for selected livestock farmers, as well as sugar cane, cocoa and coffee farmers and the egg and pork industry; enhanced Fisheries Resilience; a Disaster Risk and Mitigation Programme; and equipment and infrastructure development. Facilitated by the Rural Agricultural Development Authority (RADA), farmers continued to receive support in the areas of extension service, irrigation and marketing to improve efficiency in the industry.

In the area of National Security, there was a 5.6 reduction in the total number of reported crimes. Category 1 crimes and murders also declined, by 8.7 per cent and 1.2 per cent, respectively. A mix of strategies employed during the year included: policy and programme development, policing, social intervention, legislative reform, physical infrastructure development and technological improvements. Social intervention programmes were undertaken, targeting vulnerable groups and communities. The Citizen Security and Justice Programme ended after 19 years of operation—the Citizen Security Secretariat was established to manage implementation of the Citizen Security Plan.

Increase in access to justice services continued by way of improvement of the physical infrastructure and technological capacity of courts islandwide, and social justice services were provided through the restorative justice and the child diversion programmes, and the Victim Services Division. There was continued improvement in the case backlog rates in the island's courts, moving from 32.0 per cent at the end of 2016 to 8.9 per cent at the end of 2020.

The impact of COVID-19 on the health-care system

and its services was severe. Health-care delivery for other health services scaled down due to mandatory restrictions imposed by the government in an effort to stem the spread of the virus. This included cancellation of clinics, resulting in a reduction in outpatient service, elective surgeries and population screening programmes. Due to the interruption in services, hospital admissions declined by 22.4 per cent and visits to health centres by 13.0 per cent. To address the issue of health, and as a result of stay-at-home orders, provisions were made by the Ministry of Health and Wellness for home delivery of pharmaceuticals to patients with chronic diseases. A mental health programme was implemented in response to the various psychosocial issues that emerged from the pandemic. Other major achievements during the year were the completion of the HIV sustainability plan and the development of the draft strategic plan for Information Systems for health.

Jamaica's Medium Term Socio-Economic Policy Framework (MTF) 2018–2021 continued to be supported through Official Development Assistance (ODA) provided by International Development Partners (IDPs) in the form of new and ongoing projects and programmes. Official Development Assistance totalled US\$2.2 billion (\$315.2 billion), with disbursements amounting to US\$353.5 million (\$50.6 billion). The People's Republic of China (PRC) remained the largest cooperation programme, with funding of US\$710.3 million (\$101.8 billion).

Despite the negative impact of COVID-19 on activities, there were a number of notable achievements in Sustainable Development. Infrastructure development and upgrade at the community and national levels towards climate change adaptation were realized with, among other things, the refurbishing of the Meteorological Service Jamaica's radar station and construction of a new weather radar tower in Coopers Hill, St Andrew; installation of 20 soil moisture probes islandwide; and the construction of 1 800 MICRO check dams, establishment of five aquaponics farms and construction of three communal greenhouses in the Upper Rio Minho Watershed Management Area. Another achievement was the preparation of knowledge products and tools, such as the GIS-based BRIMMS Bridge Inspection Application, developed by the National Works Agency, to streamline the data collection process for bridge inspections.

In the area of science, technology and innovation (STI), the regulatory framework was bolstered with the opening of the Hazardous Substances Regulatory Authority (HSRA), the first full regulatory body for radiation protection and safety in Jamaica and the English-speaking Caribbean. This was complemented by

the passage of two statutes and one set of regulations in the Houses of Parliament: the Data Protection Act, 2020; the Patents and Design Act; and Electricity Regulations under the Electricity Act, 2015.

Digital connectivity was expanded to support emerging needs in the education sector and to facilitate easier delivery of Government–Government (G2G), Government–Business (G2B) and Government–Citizen (G2C) services. This included the launch of five additional hotspots; connection of more than 400 public entities to the islandwide broadband network; distribution of e-learning devices; and the launch of a number of platforms and applications. The health sector also benefited from improved connectivity at two hospitals.

With a score 29.10, Jamaica improved nine places on the Global Innovation Index to rank 72nd of 131 countries. This earned the country the position of 21st in the upper-middle income bracket and 7th in the Latin America and the Caribbean region. The performance also positioned Jamaica for the first time among the top 80 countries and enabled its placement on the list of high innovation achievers.

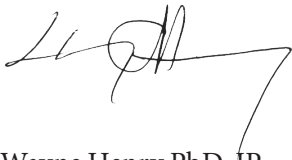
In the Education sector, activities primarily centred on providing access to quality education and training in light of the pandemic. The continuation of teaching and learning through multiple media platforms was crucial to ensure minimal disruption of advances previously made. There was an increase in enrolment in the 3–24 years cohort—an estimated 671 739 students—an increase of 25.7 per cent compared with 2019. Modifications were made to end-of-term examinations—a modified psychometric approved assessment tool was administered to over 39 000 students registered to sit the Primary Exit Profile (PEP) examination. At the secondary level, the Caribbean Examination Council (CXC) authorized the modification of examinations, which included the administration of Paper 01 (multiple choice) and Paper 03 (alternative to the school-based assessment).

The professional development of educators at all levels continued through specialized education and training courses. Training was provided to approximately 22 000 educators in the use of four Learning Management Systems (LMS) as they transitioned from face-to-face teaching and learning to online platforms. The Human Employment and Resource Training /National Service Training Agency Trust (HEART/NSTA Trust) recorded an increase in enrolment, as more than 3 500 public sector employees received quality training and leadership development options through the Management Institute for National Development (MIND).

The year 2020 was one of the most challenging ever experienced by the Jamaican economy and society. Most development targets were negatively impacted, which

prompted a process to reassess the established timelines and strategies of the Vision 2030 Jamaica – National Development Plan. It is anticipated that the negative effects of the COVID-19 pandemic will continue into 2021, however, with the strides being made to develop and roll out vaccination programmes globally, the country remains optimistic that the recovery process will become entrenched by the end of 2021. The expectation is

that herd immunity from COVID-19 will be attained by countries globally and there will be gradual removal of restrictions, which augurs well for the strengthening of economies. Although full recovery to pre-crisis levels is not expected until FY2023/24, the economy is expected to record fairly robust growth in 2021, given the low levels of output attained in 2020.



Wayne Henry PhD, JP
Director General
Planning Institute of Jamaica

ACKNOWLEDGEMENTS

The publishing of the *Economic and Social Survey Jamaica* is truly a collaborative process, which could not have been done without a hardworking team. It is with this in mind that the Planning Institute of Jamaica thanks all who made the *Economic and Social Survey Jamaica 2020* a reality. There were many challenges as we all grappled with the COVID-19 pandemic and its effect on our personal and professional lives, yet everyone pulled together to make the publication possible.

Our sincere appreciation to the Statistical Institute of Jamaica; the Bank of Jamaica; the Ministry of Finance and the Public Service and the various ministries, departments

and agencies; the private sector and non-governmental organizations that provided data, reviewed chapters and gave useful feedback. To the individuals and firms that supplied photographs, we thank you.

Last, but definitely not least, we acknowledge and say a big thank you to the chapter writers, the editorial team, the external chapter reviewers, the desktop publisher, data managers, library staff, administrators and photocopiers, all other support staff and the printers.

To our readers, we thank you for your support over the years and we look forward to your continued support in the future.

SELECTED INDICATORS 2016–2020

	Unit	2016	2017	2018	2019	2020
GDP at Current Market Prices	\$b	1 761.0 ^r	1 895.0 ^r	2 027.3 ^r	2 110.4 ^r	1 966.9
GDP at Constant (2007) Market Prices	\$b	866.9 ^r	875.5	892.1 ^r	900.0	n/a
Total Gross Value Added in Basic Values at Constant Prices^g		754.5 ^r	759.6	773.5 ^r	781.0 ^r	703.5
Growth in GDP at Constant (2007) Market Prices	%	1.4	1.0	1.9	0.9	-9.9 ^g
Goods Production as % of Total Real GDP	%	25.2	24.9	25.7	25.3	26.8
Agriculture	"	7.3	7.0	7.1	7.1	7.8
Mining & Quarrying	"	2.2	2.1	2.7	2.4	2.1
Manufacture	"	8.5	8.6	8.5	8.6	9.1
Construction	"	7.2	7.2	7.3	7.2	7.9
Services	"	78.8	79.1	78.4	78.9	78
Basic Services	"	14.2	14.2	14.1	14.1	14.0
Electricity & Water	"	3.2	3.2	3.1	3.1 ^r	3.3
Transport, Storage & Communication	"	11.0	11.0	11.0	10.9 ^r	10.7
Total Other Services	"	64.6	64.9	64.3 ^r	64.8 ^r	64.0
Financial Intermediation Services Indirectly Measured	"	4.0	4.0	4.1 ^r	4.2 ^r	4.8
Exports as % GDP (current)	"	8.7 ^r	9.0 ^r	12.4 ^r	9.5 ^r	8.4
Imports	"	33.7 ^r	36.5 ^r	38.9 ^r	40.2 ^r	34
GDP per capita						
Current	\$'000	647.0 ^r	695.2 ^r	742.3 ^r	771.9 ^r	719.1
Constant	\$'000	277.2 ^r	278.7 ^r	283.2 ^r	285.7 ^r	257.2
Consumer Price Index (CPI)(end Dec.)ⁱ		90.5	95.2	97.6	103.6	109.0
Inflation : Dec./Dec.	%	1.7	5.2	2.4	6.2	5.2
: Annual Avg	"	2.4	4.4	3.7	3.9	5.2
Implicit GDP Deflator, 2007 = 1.00 ^a	"	1.9	2.0	2.1	2.2 ^r	2.3
Changes in Implicit Deflator	%	3.6 ^r	5.0 ^r	5.0	2.5	6.4
Avg. Wtd. Comm. Bank Loan Rate	%	16.20 ^r	14.59 ^r	13.46 ^r	12.47 ^r	11.80
Avg. Wtd. Comm. Bank Deposit Rate	%	3.37 ^r	3.60 ^r	2.72 ^r	2.44 ^r	2.59
Ja. Stock Exchange Index (end Dec.)	Points	192 276.6	288 382.0	379 790.8	509 916.4	395 614.9
Stock Market Capitalisation	\$b	697.5	1 048.7	1 383.8	1 930.0	1 547.1
M1	\$b	208.7	233.5	283.5	324.9 ^r	382.1
% Change	%	6.5	11.9	21.4	14.6	17.6
M2	\$b	584.7	718.5	818.7	941.3 ^r	1 092.4
% Change	%	13.1	22.9	13.9	15.0	16.1
Total Revenue^b	\$b	499.9	560.8	629.0	649.8	575.4
Recurrent Revenue	\$b	499.3	555.9	626.5	648.6	575.0
Total Expenditure	\$b	503.4	552.1	604.6	630.4	635.9
Recurrent Expenditure	\$b	461.4	505.2	538.4	560.0	586.7
Capital Expenditure	\$b	42.0	46.8	66.2	70.4	49.2
Debt Servicing	\$b	214.7	367.5	262.2	300.5	288.1
Surplus/Deficit	\$b	-3.5	8.7	24.4	19.4	-60.6
Total Revenue as a % of GDP	%	28.0	29.0	30.6	30.5	n/a
Recurrent Revenue	"	28.0	28.8	30.5	30.4	n/a
Recurrent Expenditure	"	25.9	26.2	26.2	26.3	n/a
Total Expenditure (above-the-line)	"	28.2	28.6	29.5	29.6	n/a
Surplus/Deficit	"	-0.2	0.5	1.2	0.9	n/a
Debt Servicing	"	12.0	19.0	12.8	14.1	n/a
	Unit	2016	2017	2018	2019	2020

EXTERNAL TRADE

Total Imports (c.i.f.)	US\$ m	4 621.9 ^f	5 537.4 ^f	6 170.5 ^f	6403.4 ^f	4 712.4
Annual Growth In Total Imports	%	-10.4 ^f	19.8 ^f	11.4 ^f	2.7	- 26.4
Consumer Goods (excl. Motor Cars)	US\$ m	n/a	n/a	1 469.0	1 573.3	1 349.8
Raw Material/Intermediate Goods	US\$ m	n/a	n/a	1 904.0	1 858.4 ^f	1 540.0
Capital goods (excl. Motor Cars)	US\$ m	n/a	n/a	715.5	722.8	564.7
Passenger Motor Cars	US\$ m	n/a	n/a	319.8	373.6	264.2
Total Exports (f.o.b.)	US\$ m	1 188.2	1 363.9 ^f	1 960.7 ^f	1 516.1 ^f	1 165.1
Annual Growth In Total Exports	%	-5.3	14.8 ^f	43.8 ^f	19.1	- 23.2
Traditional Exports	US\$ m	626.1	738.1	1 307.0 ^f	889.9 ^f	597.3
Bauxite	US\$ m	91.9	83.9	100.3 ^f	95.8 ^f	88.6
Alumina	US\$ m	444.0 ^f	570.3	1 122.1 ^f	706.8 ^f	425.8
Sugar	US\$ m	14.2	14.4	16.0	10.2	6.5
Banana	US\$ m	0.4	0.5	0.6	0.6	0.7
Non-Traditional Exports	US\$ m	464.7	555.1 ^f	598.5 ^f	626.3 ^f	567.8
Wearing Apparel	US\$ m	1.7	2.0	1.7 ^f	1.7	0.9
Trade Balance	US\$ m	-3 433.7 ^f	-4 173.5 ^f	-4 209.8 ^r	-4 750.3 ^f	-3 493.6
BALANCE OF PAYMENTS						
Current Account Balance	US\$ m	-43.5 ^f	-385.6	-287.6 ^f	-318.5	-44.1
Goods Balance	US\$ m	-2.883.7	-3553.6	-3459.0 ^f	-4036.1 ^f	-2 885.9
Total Imports	US\$ m	4072	4904.3	5437.4 ^f	5,623.7	4 087.4
Total Exports	US\$ m	1188.3	1350.8	1978.4 ^f	1588.0 ^f	1 201.6
Services (Net)	US\$ m	1045.8	1196.8	1315.3	1706.7 ^f	406.1
Balance on Goods and Services	US\$ m	-1837.9	-2356.8	-2143.7 ^f	-2329.3	-2 479.7
Primary Income	US\$ m	-595.0	318.8	-596.0 ^f	-405.6 ^f	- 525.8
Secondary Income	US\$ m	2389.4	2392.3	2452.1 ^f	2416.4 ^f	2 961.5
Capital & Current Account Balance	US\$ m	-22.5	-378.5	-267.4 ^f	-345.2 ^f	- 74.9
Reserves (Minus=Increase)	US\$ m	282.4	498.1	-249.1	99.0	449.1
Private Remittance Inflows	US\$ m	2 291.5	2 305.3	2 345.8	2 405.6	2 905.0
Net International Reserves	US\$ m	2 719.4	3 208.3	3 005.4	3 162.5	3 126.1
Net Foreign Assets	\$b	377.4 ^f	482.6 ^f	450.4 ^f	463.2 ^f	581.4 ^f
Nominal Exchange Rate (\$ per US\$1.00) End of Year		128.44	125.00	127.72	132.57	142.65
Nominal Exchange Rate (\$ per US\$1.00) Average Annual	\$	125.14	128.36	129.72	134.22	143.27
Total Visitor Arrivals	Million	3.8	4.3	4.3	4.2	1.3
Stopover	Million	2.2	2.4	2.5	2.7	0.8
Cruise Passengers	Million	1.7	1.9	1.8	1.6	0.4
Occupancy Rates	%	n/a	n/a	n/a	n/a	n/a
Foreign Exchange Earnings	US\$Million	2 607.7	2 977.9	3 305.5	3 643.9 ^f	1 362.4 ^p
Energy						
Petroleum Imports ^c	mb	19.3	19.4	19.0	19.3	14.2
Electricity Generated	GWh	4 349.3	4 363.1	4 355.5	4 429.5	4 227.4
Population						
	'000 persons	2 721.7 ^f	2 725.9 ^f	2 731.0 ^f	2 734.1 ^f	2 735.4 ^p
Growth Rate	%	0.1	0.0	0.0	0.0	0.0
Crude Birth Rate	per 1000 pop.	13.3	12.6	12.1	12.7	12.3
Crude Death Rate	per 1000 pop.	7.3	7.2	6.6 ^f	7.0	6.6 ^f
Rate Natural Increase	%	6.0	5.6	5.2	5.7	5.7
Total Fertility Rate	%	2.4	2.4	2.4	2.4	2.4
Net External Movement	'000 persons	-14.8	-15.4	-15.9	-17.0	-18.0
Labour Force						
	'000	1353.7	1 360.3	1 336.8	1 349.0	1 314.0
Male	'000	730.5	730.8	720.9	727.6	712.1
Female	'000	624.1	629.5	616.0	621.4	601.9
Labour Force Participation Rate	%	64.8	65.1	64.0	64.6	63.0
Male	%	71.2	71.3	70.4	71.0	69.5
Female	%	58.9	59.1	57.9	58.5	56.7
Total Employment	'000	1175.2	1 201.8	1 215.1	1 244.9	1 180.5
Male	'000	662.4	669.1	672.5	685.3	650.5
Female	'000	515.5	532.7	542.7	559.7	530.0
Total Unemployment Rate	%	13.2	11.7	9.1	7.7	10.2
	Unit	2016	2017	2018	2019	2020
Male	%	9.3	8.4	6.7	5.8	8.7
Female	%	17.6	15.4	11.9	9.9	12.0

Average Weekly Earnings of All Employees(1990 \$) ^d	\$	n/a	n/a	n/a	n/a	n/a
Education						
Enrolment in :	('000)					
Primary Institutions	"	251.9	242.0	236.2	227.7	193.9
Secondary Institutions	"	224.0	217.0	214.0	211.8	205.8
Tertiary Institutions	'	35.7	38.4	39.2	n/a	38.7
University	"	38.5	37.6	38.9	n/a	n/a
Literacy Rate e	%	91.7	91.7	91.7	91.7	91.7
Training						
Total output of Technical, Managerial & Related Manpower	('000)	15.3	17.4	17.5	n/a	n/a
Total output of Skilled and Semi-skilled Manpower	"	60.7	73.0	81.6	n/a	n/a
Health						
Infant Mortality Rate	per '000 live births	15.8	16.7	16.6	n/a	n/a
Percentage Beds Occupancy	%	71.8	66.1	76.5	n/a	70.2
Immunization (National Average):	%					
- DPT, OPV, BCG (0–11 months)	%	97.0	93.0	96.0	95.0	n/a
- MMR (12–23 months)	%	91.0	95.0	89.0	92.5	n/a
Access to Safe Water	%	n/a	n/a	n/a	n/a	n/a
Sanitary Facility	%	n/a	n/a	n/a	n/a	n/a
Life Expectancy (at birth)	yrs	74.1	74.3	74.3	74.2	74.2
Maternal Mortality	per 100 000 live births	87.1	87.1	87.1	87.1	87.1
National Security^h						
Overall Crime Rate	per 100 000	733	675	599	628	593
Category 1 Crime Rate	"	234	242	208	224	224
Murder Rate	"	49	60	47	49	48
Environmental						
Annual rate of change, Broadleaf Forest	%	-0.2	-0.2	-0.2	-0.2	-0.2
Annual rate of change, Open Dry Forest	%	-7.2	-7.2	-7.2	-7.2	-7.2
Energy Consumption per capita	(BOE)	7.8	7.4 ^r	7.9 ^r	8.2 ^r	6.7 ^p
Alternative Energy ('000)	(BOE)	1 189 ^r	1 569 ^r	1 576 ^r	1 786 ^r	2 595 ^p
Per capita domestic water consumption	Megalitres	0.032	0.032	0.031	0.031	0.030 ^p
Annual Rainfall (mm)	mm	1 720	2 154	1 575	1 401 ^r	1 734
Avg. Annual Temperature ^f	Celsius	27.8	28.2	28.2	28.2	28.2
% population in urban areas	%	54.0	54.0	54.0	54.0	54.0
Per Capita Waste generation	(kg/day)	n/a	1.0	1.0	1.0	1.0
Science, Technology & Innovation						
Fixed Telephone Penetration	%	11.4	10.9	13.3	14.6	15.9
Mobile Penetration	%	120.0	113.3	116.8	110.6 ^r	105.0
Broadband Penetration (fixed line)	%	7.0	7.4	10.4 ^r	11.6 ^r	14.1 ^p
Broadband Penetration (mobile subscriptions)	%	58.2	51.8	55.1 ^r	59.6 ^r	63.7 ^p
Networked Readiness Index		83	n/a	n/a	78	n/a
ICT Development Index		99	98	n/a	n/a	n/a
Resident patent filings		19	11	27	14	10

NOTES:

a – The Implicit Deflator, an index of average prices, is calculated as the ratio of GDP at current prices to GDP at constant prices

b – Revenue and expenditure figures are for fiscal years 2015/16–2020/21

c – Excluding marketing companies

d – From Survey of Employment, Earnings and Hours Worked in Large Establishments, Statistical Institute of Jamaica

e – Figure for 2012–2016 is based on the Literacy Module of the Jamaica Survey of Living Conditions (2008)

f – Average of temperatures for two main international airports

g – Due to the unavailability of real GDP data at the time of writing, Total Gross Value Added in Basic Values at Constant Prices is used as a proxy for real GDP

h – The JCF made changes to its classification of crimes and major crimes was changed to Category 1 crimes. The 2012 rate has been recalculated based on the new classification

i – A revised CPI was introduced in April 2020 (Base Year 2019). The CPI values represent the revised numbers from that index

mb – million barrels

n/a – not available

p – provisional

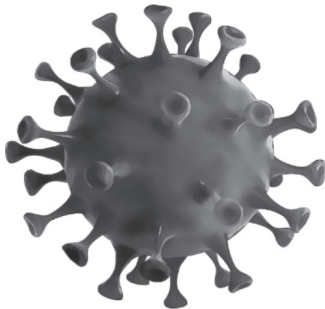
r – revised

BOE – Barrel of Oil Equivalent

OVERVIEW

OVERVIEW 2020

INTRODUCTION



COVID-19

During 2020, the global economy encountered the full effects of the Coronavirus Disease 2019 (COVID-19) as it was declared a pandemic on March 11, 2020. The COVID-19 pandemic resulted in the most severe economic contraction to be recorded in several decades. The pandemic magnified the structural and institutional weaknesses which existed in countries as they attempted to implement measures to effectively contain its spread. The measures implemented largely involved quarantines, travel restrictions, border closures and country-wide lockdowns and have resulted in sharp and sustained reductions in demand and supply. The measures not only had a direct adverse impact on economies but also on health-care systems. Given inherent vulnerabilities including high indebtedness; limited diversification of their production base which results in a high dependence on a few industries; high levels of informality; and a high degree of susceptibility to natural, economic and health-related shocks, many countries were constrained in their ability to employ effective measures to mitigate the severity of the pandemic. Global Economic output was estimated to have contracted by 3.3 per cent.



Hotels & Restaurants

↓ 53.8%

Hotels & Restaurants industry contracted by an estimated 53.8 per cent, while associated sectors of entertainment,

attractions and other services, also contracted. As a consequence, real GDP for 2020 was estimated to have contracted by 9.9 per cent.

The effects of the pandemic and the policies implemented in response, increased the demand for liquidity to address the emergency needs of the country. Over the last decade, Jamaica has implemented a series of structural reforms with the support of our international development partners. The economy benefited from the implementation of an Economic Reform Programme, which resulted in entrenched macro-economic stability, evidenced by low unemployment and inflation rates; a declining debt-to-GDP ratio; and seven consecutive years of economic growth. Given these improvements, the Jamaican economy was in a position to address some of the immediate challenges which arose at the onset of the pandemic. To cushion the effects of the pandemic on the society, the Government of Jamaica implemented a stimulus package which included a cash transfer programme—COVID Allocation of Resources for Employees (CARE). The CARE Programme involved the temporary transfer of cash to individuals and businesses that were impacted and vulnerable to the effects of the pandemic. Transfers were directed at the poor, unemployed, self-employed, student loan debtors, small business operators and the tourism sector. In addition to the CARE programme, increased funds were allocated to the health sector to enhance the resources to monitor and contain the spread of the disease. This was facilitated through the revision of the fiscal budget which resulted in the tabling of three supplementary budgets for FY2020/21. The revised budgets reflected the reprioritization of expenditure towards health-care, social protection and other COVID-19 related activities. To reflect these changes to the budget, the Fiscal Rule, which stipulates a legally binding target of a debt-to-GDP ratio of no more than 60.0 per cent by end FY2025/26, was suspended for two years to FY2027/28.

The COVID-19 pandemic also resulted in a disruption in Foreign Direct Investment (FDI) flows to developing countries as major investment projects and decisions were halted, given medium-term uncertainties. However, several multilateral institutions responded to the liquidity demands of developing countries like Jamaica, with a series of initiatives aimed at mitigating the immediate impacts of

the pandemic and provide finance for economic recovery. The Government of Jamaica requested and received emergency financing from the IMF in the amount of US\$520.0 million (100.0 per cent of quota) through the Rapid Financing Instrument, which was used to support Balance of Payments needs stemming from the COVID-19 pandemic.

From a development perspective, the pandemic also highlighted Jamaica’s socio-economic vulnerabilities and threatened the achievement of development targets within the timelines outlined in the *Vision 2030 Jamaica – National Development Plan*. Accordingly, revisions of these timelines and strategies were undertaken.

Official Development Assistance (ODA) provided by International Development Partners (IDPs) in the form of new and ongoing projects and programmes, supported the implementation of the country’s medium-term strategic priorities. During the year ODA totalled US\$2.2 billion (\$315.2 billion), with disbursements amounting to US\$353.5 million (\$50.6 billion). The People’s Republic of China (PRC) remained the largest cooperation programme, with funding of US\$710.3 million (\$101.8 billion) or 32.3 per cent of total ODA.

Sustainable Development activities during the year were challenged due to the impact of COVID-19 and the measures implemented to manage its spread. However, efforts were focused on infrastructure development and upgrade at the community and national levels towards climate change adaptation, as well as the preparation of knowledge products and tools such as the GIS-based BRIMMS Bridge Inspection Application to streamline the data collection process for bridge inspections. Work was also advanced on strengthening the policy planning and legislative framework.

Efforts at advancing the **Science, Technology and Innovation (STI)** agenda continued with focus on areas such as sustainable energy, food security, research and enhancement of the national quality infrastructure. Key achievements included the opening of the Hazardous Substances Regulatory Authority (HSRA) which represents the first full regulatory body for radiation protection and safety in Jamaica and the English-speaking Caribbean. The Bureau of Standards Jamaica was granted a two-year authorization to receive, test, handle, transport and dispose of Cannabis for medical, therapeutic and scientific purposes, on behalf of the Cannabis Licensing Authority. Seven standards related to medical Cannabis were also among the 40 product standards launched and promulgated during the year.

Jamaica continues to move towards the advanced stage of the demographic transition, a direct consequence of transitioning from high to low fertility and mortality rates. The declining trend in Jamaica’s population average annual rate of growth, reaching zero growth for the first time in 2017, continued in 2020. At the end of the year, the population was estimated at 2 735 400, reflecting the interactions of the main population processes, births, deaths and migration. The Age Dependency Ratio (ADR), which measures total dependency of both the child and elderly populations, continued to decline, largely reflecting the expanding working age population. Developments with the key labour market indicators reflected the adverse impact of COVID-19. The **labour force** averaged 1 314 033 persons, a decrease of 34 967 of persons, while the number of persons outside the labour force increased by 4.7 per cent to 772 233. The **unemployment rate** averaged 10.2 per cent up 2.5 percentage points, reflecting a 5.2 per cent decline in the **number of employed persons**.

Within the **Education and Training** sector, emphasis was placed on facilitating teaching and learning through multiple media platforms, which was crucial to ensure that advances made were not significantly disrupted by the pandemic. Terminal examinations were modified in response to the effects of the pandemic. For the Primary Exit Profile examination, a modified psychometrically approved assessment tool was administered to students. The Caribbean Examination Council (CXC) also authorized



the modification of its examinations. Additionally, focus was placed on the professional development of educators at all levels through specialised education and training courses. Training was provided in the use of four Learning Management Systems (LMS) as institutions transitioned from face-to-face teaching and learning to online platforms and other non-traditional media.

The **Health** sector was adversely affected by the COVID-19 Pandemic which severely impacted health-care systems and services.



The first case of the virus was confirmed on March 10, 2020, and at the end of December 2020, some 12 915 persons tested positive while there were 303 deaths. Health-care

delivery and services was scaled down due to restrictions imposed to manage the spread of the virus. This included cancellation of clinics which resulted in a reduction in outpatient service, elective surgeries and population screening programmes.

In the area of **Social Development, Social Protection & Culture**, efforts focused on expanding social inclusion and improving the delivery of social services to vulnerable population groups. Policy and programmatic responses aimed at addressing the socio-economic impact of the COVID-19 pandemic were implemented. The social protection landscape benefited from the support of international development partners in the areas of infrastructure and capacity improvement. The care and protection of the nation's children remained a priority, as evidenced by the full implementation of plans and programmes addressing violence against children.

Efforts to strengthen **National Security and Justice** was supported by a mix of strategies which included policy and programme development; policing; social intervention; legislative reform; physical infrastructure development; and technological improvements. There was increased access to justice services through the improvement of the physical infrastructure and technological capacity of courts islandwide, while social justice services were provided through the restorative justice and the child diversion programmes, and the Victim Services Division. For 2020, Category 1 crimes and murders declined by 8.7 per cent and 1.2 per cent, respectively.

VISION 2030 JAMAICA – NATIONAL DEVELOPMENT PLAN

Jamaica entered the final decade of implementation of Vision 2030 Jamaica – National Development Plan (NDP), which covers the 21-year period 2009–2030. Vision 2030 Jamaica is the country's first long-term strategic national development plan that provides a road map and implementation framework for advancing the country towards developed country status and specifically to achieve 2030 development targets aligned with four synergistic and interdependent national development goals. The implementation framework for Vision 2030 Jamaica includes the successive 3-year Medium Term Socio-Economic Policy Framework (MTF), an integrated evidence- and results-based management framework and a participatory development framework. Jamaica continued to implement its 4th MTF, which covers the period 2018–2021 with recognition that changes in policies, plans and budgetary priorities and resource allocations in response to the COVID-19 pandemic had implications for the implementation of medium- and long-term development strategies and associated goals and outcomes.

The COVID-19 pandemic had a noticeable impact on the implementation of Vision 2030 Jamaica and the Sustainable Development Goals (SDGs) through Vision 2030 Jamaica. There were forced adjustments to plans, public policy and resource allocations by government, private and civil society actors, as well as international development partners (IDPs). Several vulnerabilities associated with systemic and structural development challenges that were being addressed under Vision 2030 Jamaica were made more evident, with some extending beyond the traditional vulnerable groups such as the “poor” to impact the lives of the non-poor whose employment, income, health, education, food security and psycho-social environments were affected. Some development challenges were reshaped and redefined, requiring that the strategic integrated evidence- and results- based management framework for the implementation of Vision 2030 Jamaica, including the MTF, would have to appropriately respond. A process of strategic review to inform the strengthening of the results-based management framework and plan was expanded to include an assessment of the impact of COVID-19. This was intended to support the continued relevance of Vision 2030 Jamaica and improve resilience, agility, and adaptability in responding to shocks and crises.

Vision 2030 Jamaica was also demonstrated to have a positive impact on coordination of the response to COVID-19, providing a framework for the development of response strategies and plans. Several IDPs and other partners sought to align their support of Jamaica's national response to Vision 2030 Jamaica. Partners continued to work towards implementing the MTF despite recognized impediments.

The relevance of the national strategies was elevated and associated with Jamaica's resilience in areas such as macroeconomic stability. Through the alignment of Vision 2030 Jamaica and the SDGs, development actors were able to simultaneously demonstrate support for Jamaica's COVID-19 response and advance the implementation of the SDGs at the start of the "Decade of Action" for delivering on the SDGs. Vision 2030 Jamaica also provided a framework for Jamaica's participation in SDGs and other related regional and international dialogue regarding global governance, policy coherence and reducing inequalities towards "building forward better".

The Planning Institute of Jamaica (PIOJ) in its capacity as the National Focal Point for Vision 2030 Jamaica, through the Vision 2030 Jamaica Secretariat, leads the coordination of Plan implementation, including the preparation of each MTF, monitoring and evaluation, communication and reporting and stakeholder engagement. The PIOJ is also responsible for integrating the SDGs in the implementation of Vision 2030 Jamaica.

The main activities undertaken and/or results achieved included:

- Supported efforts and/or capacity building of stakeholders to align policy, strategic and operational planning, local sustainable development planning and the development frameworks and country programmes of international development partners with MTF 2018–2021
- Quarterly Updates and Reporting on National Development Results
- Completion of key activities in the preliminary phase of a strategic review to strengthen the National Development Plan, the Implementation Framework and Evidence- and Results-Based Management Framework, and the integration of the SDGs in Plan implementation
- Localization of Vision 2030 Jamaica and the SDGs, including supporting St Thomas and Portmore in the development of their Local Sustainable Development Plans
- Planning, undertaking preliminary research and template development for MTF 2021–2024
- Engagement of stakeholders across the island, region and global community in communication, knowledge sharing and social responsibility initiatives
- Participation in and support of regional and global efforts to advance the SDGs, including participation in an ECLAC Community of Practice for Countries preparing to present Voluntary National Review (VNR) Reports at the annual High-level Political Forum (HLPF) on Sustainable Development.

In 2020, a total of 75 indicators were used to monitor progress towards the achievement of the national outcomes and goals. Vision 2030 Jamaica utilizes a baseline year of 2007,¹ with targets aligned with the end of each MTF period. The data available in 2020 largely covered the period up to 2019 and therefore reporting is limited to national outcomes associated with pre-COVID-19 Plan implementation. The data therefore serve as a proxy baseline for measuring development performance post COVID-19 pandemic.

Over the period 2009–2019, the country recorded mixed development performance under Vision 2030 Jamaica, and specifically successive MTFs covering the periods 2009–2012, 2012–2015, 2015–2018 and 2018–2021. Notable developments gains were recorded across several areas including:

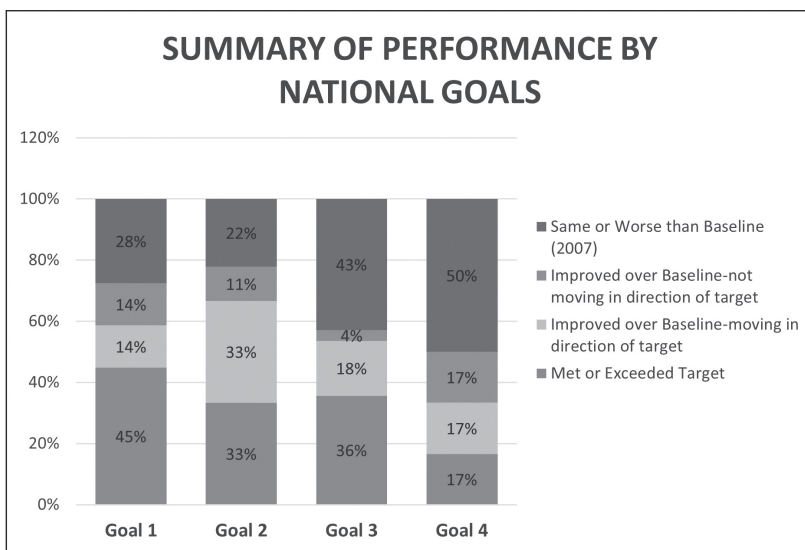
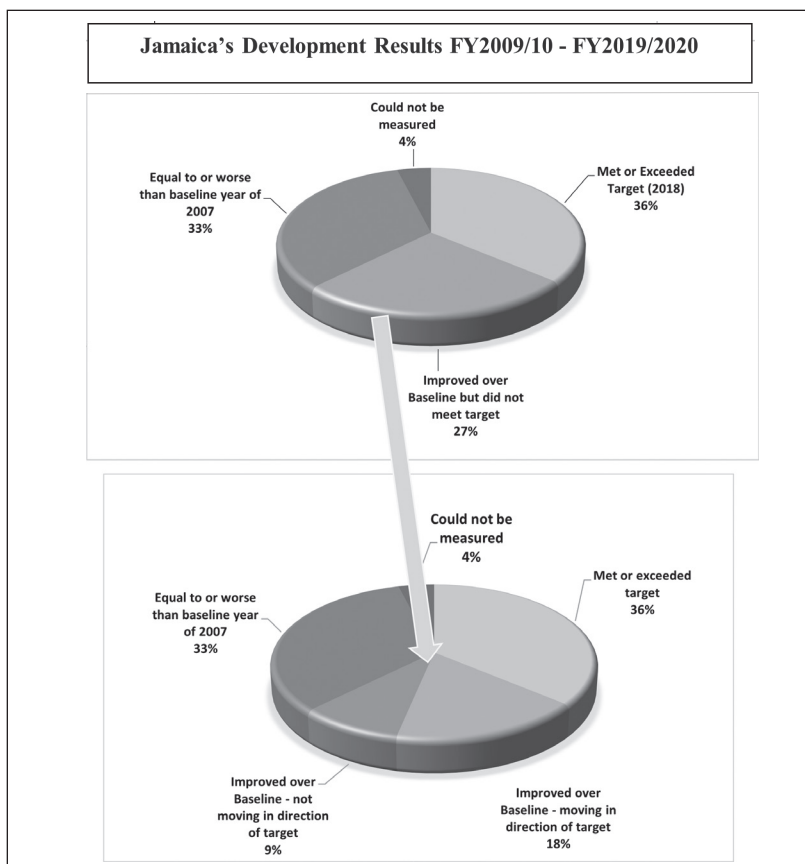
- Human capital development
- Macroeconomic stability
- Reduction in unemployment
- Increases in the use of non-fossil fuel based energy such as alternatives and renewables
- Governance, particularly in government effectiveness
- Economic growth in some industry structures particularly tourism, manufacturing, and finance and insurance services
- Infrastructural development and housing quality.

Areas of challenge owing to insufficient progress and/or development losses included low levels of economic growth; increase in the rate of chronic non-communicable diseases (NCDs); a fall in environmental sustainability; and inadequate levels of competitiveness and earnings in key economic sectors. In some areas, Jamaica showed improvement but lost some ground in global rankings. This was evident in the improvement of Jamaica's score on the Ease of Doing Business Index while the country rank did not show equal improvement. Jamaica lost an average of two points in its Human Development Index (HDI) ranking for the period 2014–2019, while maintaining its position in the second tier High Human Development category of the Human Development Index (HDI). Jamaica recorded gradual increases in its HDI score over the period of Plan implementation and maintained a score of 0.734 for 2017–2019.

A summary of the performance across the 75 indicators shows that approximately 63.0 per cent improved over the baseline year 2007 while approximately 33.0 per cent showed no improvement or worsened relative to the baseline year of 2007. Only 4.0 per cent of the indicators could not be compared in this way due to lack of agreed targets for the relevant period and/or unavailability of data.

Of the indicators that showed improvement, 36.0 per cent met or exceeded targets and 26.7 per cent showed some

1. If data is unavailable for 2007, the closest data point is utilized.



improvement over the baseline year 2007. Eighteen per cent of indicators that showed improvement but did not meet target, were advancing towards the target, while the remaining 9.0 per cent showed slippages and were moving away from the target. An examination of progress by National Goal showed that Goal 2 “Security and Safety” had the highest percentage of indicators that showed improvement over baseline (78.0 per cent) while Goal 4 had the lowest percentage of indicators showing improvement (approximately 50.0 per cent).

Thematic Working Groups (TWGs) serve as the main stakeholder consultative mechanism for monitoring and evaluation (M&E) under Vision 2030 Jamaica. Owing to the focus on the process of strengthening the results-based M&E Framework and System for Vision 2030 Jamaica, and particularly the strategic review, Thematic Working Group (TWG) Meetings were suspended in 2020 with exceptions made for advancing specific stakeholder-led processes. One of the main activities supported was the completion of the Draft Results Framework, and Monitoring and Evaluation System for Sport. Meetings of the Population Thematic Working Group (TWG) and National Social Protection Committee (NSPC) which serve as a TWG Proxy were convened, with main activities focused on advancing the development of the revised National Population Policy (1995)—National Population and Sustainable Development Policy—and advancing the coordination of the implementation of the Jamaica Social Protection Strategy (2014), respectively.

The Secretariat continued to engage a range of stakeholders in knowledge and information sharing on Vision 2030 Jamaica and explored opportunities for partnership in advancing the achievement of the national development goals. Over the reporting period, over 20 communications initiatives were undertaken. Approximately 54 257 copies of the Popular Version of *Vision 2030 Jamaica – National Development Plan* have been distributed to stakeholders islandwide through various communication interventions, along with the Vision 2030 Jamaica Popular Version Audiobook, Information Video, Citizen’s Guide to Understanding Vision 2030 Jamaica and other information and promotional materials.

INTERNATIONAL ECONOMY

Global economic activity was estimated to have contracted by 3.3 per cent. This downturn was the result of the novel Coronavirus Disease 2019 (COVID-19) which caused a severe health crisis. The impact of the disease was exacerbated by the implementation of containment measures which constrained global



Global Output ↓ 3.3%

output and disrupted labour markets. COVID-19 resulted in a reduction in work hours, employment loss, labour income loss and the increased use of digital platforms to conduct work. Consistent with the decline in economic activity, global trade in both goods and services also contracted (down 10.4 per cent to US\$22 062.0 billion). Travel services were largely impacted due to the measures of border closures and travel restrictions implemented. However, there was an increase in the trade of medical products and home office equipment as individuals adjusted to working at home.

As a consequence of the pandemic, both Advanced and Emerging Market & Developing Economies experienced declines in output. The International Monetary Fund noted that of the 194 countries monitored, 166 recorded lower GDP output. In response, the international community and local governments initiated a number of programmes and initiatives aimed at suppressing the transmission of the virus and engendering economic recovery through financial support.

With regard to commodity markets, energy prices declined. Downward pressure on crude oil prices, which fell by 32.8 per cent, stemmed from lower demand due to a halt in international travel and reduced industrial production. Also contributing was an increase in supply due to a breakdown in negotiations between OPEC+ members. Weather-related shocks and increased demand caused Agricultural commodity prices to rise.

OFFICIAL DEVELOPMENT ASSISTANCE (ODA)

Jamaica's Medium Term Socio-Economic Policy Framework (MTF) 2018–2021 continued to be supported through Official Development Assistance (ODA) provided by International Development Partners (IDPs) in the form of new and ongoing projects and programmes, which aimed to implement the country's strategic priorities over the three-year period. In 2020, ODA totalled US\$2.2 billion (\$315.2 billion), with disbursements amounting to US\$353.5 million (\$50.6 billion). The People's Republic of China (PRC) remained the largest cooperation programme, with funding of US\$710.3 million (\$101.8 billion).

New ODA totalled US\$305.8 million (\$43.8 billion), an increase of US\$164.9 million (\$23.6 billion) compared with the previous year. Loan approvals amounted to US\$200.0 million (\$28.7 billion), while new grant financing totalled to US\$105.8 million (\$15.1 billion). Of the new loan approvals, US\$192.2 million (\$27.5 billion) was provided in budget support financing for reform and actions in the areas of health, citizen security and disaster management. Assistance from Multilateral Financing Institutions (MFIs) accounted for the majority of new ODA with funding of US\$229.5 million (\$32.9 billion).

SUSTAINABLE DEVELOPMENT & SCIENCE, TECHNOLOGY AND INNOVATION

SUSTAINABLE DEVELOPMENT (SD)

Sustainable development activities were supported by budgetary allocations of \$18.3 billion. While the sector was affected by the COVID 19 pandemic, mainly due to widespread closures and movement restrictions to curtail its spread, a number of achievements were realised. Among these were:

- Infrastructure development and upgrade at the community and national levels towards climate change adaptation, including:
 - the refurbishing of the Meteorological Service Jamaica's radar station and construction of a new weather radar tower in Coopers Hill, St Andrew
 - installation of 20 soil moisture probes islandwide
 - construction of 1 800 MICRO check dams, establishment of five aquaponics farms and construction of three communal greenhouses in the Upper Rio Minho Watershed Management Area
- preparation of knowledge products and tools such as the GIS-based BRIMMS Bridge Inspection Application developed by the National Works Agency to streamline the data collection process for bridge inspections.

In addition, work advanced on the strengthening of the policy planning and legislative framework with, among other things, amendment to the Registration of Titles, Cadastral Mapping and Tenure Classification (Special Provisions) (Amendment) Act, 2020, the tabling in Parliament of the Beach Access and Management Policy of Jamaica and the Biosafety Policy of Jamaica as Green Papers. Analytical work was completed on climate change mitigation approaches that culminated in the submission of the island's Updated Nationally Determined Contribution (NDC) to the United Nations Framework Convention on Climate Change. The NDC targets reduction in greenhouse gas emissions by 25.4 per cent (unconditional) to 28.5 per cent (conditional) by 2030.

Jamaica was placed among countries in the High Human Development category with a ranking of 101 out of 189 countries and territories, and a Human Development Index (HDI) value of 0.734. The island's HDI score was however, below the average (0.753) for the category and lower than the average (0.766) among countries in Latin America and the Caribbean.

The island was impacted by the health disaster COVID-19 beginning on March 10. Preliminary cost of losses associated

with the event for the initial stage of the disaster (between March and June 2020) was estimated at \$84.59 billion or 4.0 per cent of GDP/Real Value Added. The productive sectors, primarily tourism and agriculture, registered the highest losses, amounting to \$49.59 billion combined. In the infrastructure sector (transportation, electricity, and water and sanitation), the cost of impact was estimated at \$1.28 billion, most of which was in the transport sub-sector and categorized as public losses. The social sectors of education, health, culture, entertainment and sports incurred losses amounting to \$31.53 billion or over 37.3 per cent of the total losses.

Heavy rainfall associated with Tropical Storms Eta and Zeta affected the island in October and November. Damage and losses related to infrastructure and the agriculture sector from these events were estimated at \$6.7 billion, with an additional \$762.1 million estimated for further road improvement and rehabilitation. Two persons lost their lives and the livelihood of approximately 15 000 farmers was affected. The storms mainly affected southern and northeastern parishes.

There were 10 209 genuine fire calls for the year, the largest occurred in Kingston and St Andrew (1 945), followed by St Catherine (1 672). A total of 1 796 persons were impacted by fire, 31 died, 17 persons sustained injuries and 1 676 were rendered homeless. A total of 701 seismic events were recorded in the year; 18 were felt. Sixteen occurred on the mainland, with magnitudes ranging between M2.8 and M4.6 on the Richter scale.

Jamaica ranked 66 (out of 180 countries) on the 2020 Environmental Performance Index with a score of 48.2, and scored above the world and regional averages in two of the 11 areas assessed. In addition, improvements were recorded in forestry management with 162.2ha of denuded lands reforested across 12 parishes. On the negative side, coral reefs continued to show degradation, with the overall Coral Reef Health Index registering poor with a score of 2.0 compared with 2.2 in 2019. This represents the 6th consecutive year for which the island's reefs have registered poor on the index. In addition, marine water quality was below standard and the island's beaches eroded at an average 3.6 per cent.

SCIENCE, TECHNOLOGY AND INNOVATION (STI)

The science, technology and innovation (STI) agenda continued to advance through the application of scientific knowledge and technological innovation across various sectors. The opening of the Hazardous Substances Regulatory Authority (HSRA) as the first full regulatory body for radiation protection and safety in Jamaica and the English-speaking Caribbean, served to bolster the regulatory framework. This was complemented by the passage of two statutes and one set of regulations in the Houses of Parliament, namely the Data Protection

Act, 2020, the Patents and Design Act, and Electricity Regulations under the Electricity Act, 2015.

Regulation of the medical cannabis industry was strengthened with a two-year authorization granted to the Bureau of Standards Jamaica to receive, test, handle, transport and dispose of *Cannabis* for medical, therapeutic and scientific purposes, on behalf of the Cannabis Licensing Authority. Seven standards related to medical *Cannabis* were also among the 40 product standards launched and promulgated during the period. Certificates of accreditation were awarded to eight national conformity assessment bodies, including three medical entities that met the requirements for quality and competence in medical laboratories (ISO 15189:2012), and five testing entities that met the general requirements for the competence of testing and calibration laboratories (ISO/IEC 17025:2017).

The application of tissue culture technology supported the bio-economy by facilitating the production of clean planting materials to propagate ground provisions and preserve endangered endemic species of orchid and cacti. Crop resilience and disease surveillance and monitoring were also improved through the use of technology. Investments in sustainable energy production and diversification yielded a contribution of 17.0 per cent of total generation capacity and 13.0 per cent of total electricity produced. This was facilitated, in part, by the coming on stream of a 94 MW Combined Heat and Power Plant, Jamaica's third large-scaled plant fuelled by Liquid Nitrogen Gas (LNG) which accounted for a 31.0 per cent increase in energy produced from LNG. The use of solar energy also expanded with the installation and commissioning of a photovoltaic system at the Bengal Pump Station in Trelawny to drive irrigation processes. Approval and roll out of the Integrated Resources Plan (IRP) laid the groundwork for increased renewable energy contributions; lower greenhouse gas emissions; job creation and economic growth; improved efficiency; and cost savings for customers.



The education curricula continued to promote the integration of science, technology, engineering and mathematics (STEM) at all levels. For higher education institutions in particular, educational offerings responded to societal needs with the introduction and revision of several courses including two new undergraduate programmes in Mines and Quarry Management, and Police Studies and Management. Prioritization of STI training and popularization also facilitated the emergence of a number of innovative ICT concepts in areas such as education, agriculture, health-care, commerce, and security. Innovation continued to be observed across

various sectors, particularly through value addition to local agricultural products. Additionally, in response to the shortage of medical equipment to treat critically ill COVID-19 patients, two local private companies developed a ventilator prototype comprised of locally sourced and 3-D printed parts.

Digital connectivity was expanded to support emerging needs in the education sector and facilitate easier delivery of Government–Government (G2G), Government–Business (G2B) and Government–Citizen (G2C) services during the COVID-19 pandemic.

This included the launch of five additional hotspots; connection of more than 400 public entities to the islandwide broadband network; distribution of e-learning devices; and the launch of a number of platforms and applications.

The health sector also benefited from improved connectivity at two hospitals, which served to improve the timely transfer of digital X-rays,



use of Computerized Tomography (CT) Scans and other processes that support delivery of health-care.

With a score 29.10, Jamaica improved nine places on the Global Innovation Index to rank 72nd of 131 countries. This earned the country the position of 21st in the upper-middle income bracket and 7th in the Latin America and the Caribbean region. The performance also positioned Jamaica for the first time among the top 80 countries and enabled its placement on the list of high innovation achievers.

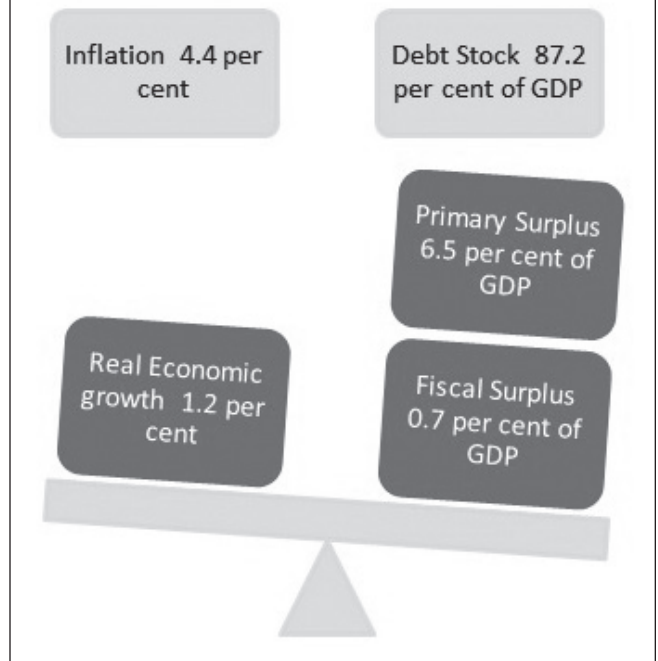
THE ECONOMY

MACROECONOMIC POLICIES AND PERFORMANCE

The Vision 2030 Jamaica – National Development Plan continued to guide the formulation of Jamaica’s policies and programmes. The Plan which outlines the strategies to engender economic growth and development is being implemented through a series of three-year Medium Term Socio-Economic Policy Framework (MTF). With respect to economic policy, the current MTF for the period 2018–2021 seeks to ensure a sustainable level of debt, maintain and promote financial stability and ensure that prices are predictable and stable.

In response to the onset of the pandemic, GOJ’s policies focused on supporting the recovery of jobs and economic output.

Some key quantitative targets for FY 2020/2021



However, with the shock to the economy brought on by the COVID-19 pandemic, these targets were subsequently adjusted. The GOJ continued to pursue ongoing macroeconomic policies with some adjustments to directly address the COVID-19 impact. This was underscored by the passing of the Financial Administration and Audit (Amendment) Act, 2020 which suspended the fiscal rule of meeting the debt-to-GDP ratio target of 60.0 per cent by FY2025/26 by two years to FY2027/28.

Economic Performance

Real Gross Domestic Product (GDP) contracted by 9.9 per cent in 2020, and halted the seven-year trend of growth. The impact of the pandemic was greater on the Services Industry which declined by 10.9 per cent while the Goods Producing Industry fell by 4.5 per cent. All industries contracted, with the exception of Producers of Government Services. The key factors that contributed to this lower economic performance included:

- the COVID-19 pandemic and measures to curb its spread, including temporary border closures, curfews which curtailed productive hours and limitations on gathering, which restricted activities related to entertainment



- and dining out
- lower average employment² with a decline of 64 567 persons to 1 180 500, resulting in lower domestic demand
- lower external demand for some Jamaican goods and services, specifically for tourism
- lower output in the mining sector as a result of the closure of the Alpart refinery, which was in operation for nine months in 2019
- adverse weather conditions (drought and flooding) which hampered agricultural output
- lower business and consumer confidence, influenced by the uncertainty regarding the depth and duration of the pandemic, which curtailed investment.

Money & Inflation



The overarching framework of the GOJ's macroeconomic programme rested on the pillars of price and financial stability. These shaped the Bank of Jamaica's (BOJ's) monetary policy directives, which targeted inflation remaining within 4.0 per cent–6.0 per cent. The Central Bank considered this level of inflation compatible with a stable and competitive macroeconomic environment that engenders economic growth and increased employment. For 2020, point-to-point inflation was 5.2 per cent. This increase in the general level of prices emanated mainly from adverse weather conditions, which negatively affected agricultural production especially for vegetables and starchy foods, and increased electricity rates, associated with higher fuel and billing exchange rates in electricity bills.

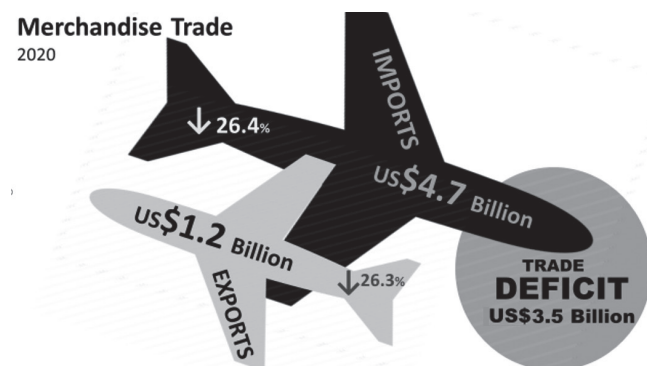
Signalling its commitment to an expansionary monetary policy, the BOJ maintained its policy rate³ at 0.50 per cent throughout the year. This occurred within the context of the adverse effects of the Coronavirus Disease 2019 (COVID-19) which caused a decline in economic activity both domestically and internationally. The shock to the economy led to eight measures being implemented by the Central Bank to maintain adequate levels of liquidity within the economy. Three of these were foreign currency measures, with the remaining five addressing the Jamaican currency. In addition to these measures, the Central Bank also reduced the cash reserve requirement of deposit-taking institutions (DTIs) for local and foreign currency. Among the Jamaican currency measures was the removal of limits on funds that can be borrowed overnight by DTIs under the Standing Liquidity Facility (SLF).⁴ Funds borrowed in excess of these limits were previously charged at the Excess Funds Rate.⁵ DTIs are now only limited by collateral in their access to funds at the SLF rate.

Fiscal

Central Government operations generated a *fiscal deficit* of \$70.3 billion relative to a budgeted deficit of \$74.2 billion for the April–December 2020 period. This was due to lower than planned Expenditure (above the line) by \$3.6 billion to \$468.5 billion, outweighed by higher than budgeted Revenue & Grants by \$0.4 billion to \$398.3 billion. Additionally, the primary balance of \$17.5 billion was \$5.5 billion higher than programmed.

Balance of Payments & External Trade

Against the background of the COVID-19 pandemic and measures implemented to curtail its spread, Jamaica's



2. Average Employment represents data for January, July and October of 2019 and 2020 as no survey was conducted in April 2020 due to COVID-19.
3. The BOJ's policy rate is the interest rate on overnight balances of deposit-taking institutions held at the BOJ.
4. The Standing Liquidity Facility is the BOJ's overnight standard interest rate on lending to depository corporations.
5. The Excess Funds Rate is the rate at which DTIs access overnight liquidity for amounts in excess of their individual SLF limit. The interest rate is the SLF limit + 4.0 percentage points.

merchandise trade activity declined relative to 2019. A reduction in imports to US\$4 712.4 million coupled with lower exports of US\$1 218.7 million resulted in an improved trade deficit of US\$493.7 million. This was relative to a deficit of US\$4 750.3 million recorded in 2019. Lower spending in eight of 10 S.I.T.C sections was the main contributor to the overall reduction in merchandise imports while the reduction in the level of exported alumina accounted for lower merchandise exports.

The balance on the current and capital accounts improved to a net borrowing position of US\$74.9 million compared with US\$345.2 million in 2019. This out-turn mainly stemmed from a fall in the deficit on the **Current Account**, in part due to increased remittance inflows. As of December 2020, the stock of **Net International Reserves** was \$3 130.79 million, down from \$3 162.5 million at the end of 2019, primarily due to an increase in liabilities which exceeded the rise in Total Foreign Assets. Increased liabilities to the International Monetary Fund contributed to the increase in foreign liabilities.

Net Remittance Inflows increased by 25.0 per cent to US\$2 678.0 million. This was due to the combined impact of higher inflows of US\$499.4 million and a US\$36.5 million decline in outflows. The United States remained the largest source of remittance inflows. The nominal exchange rate was \$142.65 to US\$1.00 at the end of December and represented a nominal depreciation of 7.6 per cent.

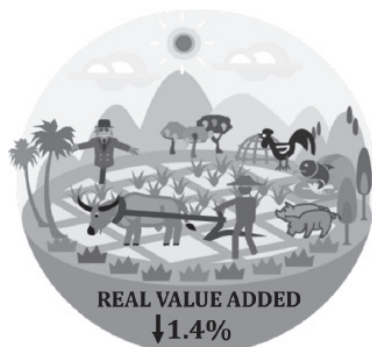
SECTORAL PERFORMANCE

GOODS PRODUCING INDUSTRY

Agriculture, Forestry & Fishing

Real Value Added (RVA) for the Agriculture, Forestry & Fishing industry contracted by 1.4 per cent relative to 2019 and contributed 7.8 per cent to Total Real Value Added. The decline in Traditional Export Crops, Animal Farming and Fishing outweighed an increase in Other Agricultural Crops, as indicated by the PIOJ's Agriculture Production Index (API). The industry's performance

was the result of the negative impact of the Coronavirus Disease 2019 (COVID-19) pandemic on the economy coupled with adverse weather conditions. Further decline was tempered by the reorganization of the government's Production and



Productivity Programme to facilitate the swift recovery of the agricultural sector. The sector also benefited from funding support to priority initiatives to include a Buy-back Programme; subsidies and incentives for selected livestock farmers, sugar cane, cocoa and coffee farmers; egg and pork industry; enhanced Fisheries Resilience; Disaster Risk and Mitigation Programme; and equipment and infrastructure development. Facilitated by RADA, farmers continued to receive support in the areas of extension service, irrigation and marketing to improve efficiency in the industry.

Compared with 2019, Traditional agricultural commodities export earnings increased to \$18.5 million compared with US\$16.1 million in 2019. This was supported by earnings from the export of Banana and Coffee by 25.6 per cent and 32.7 per cent to US\$726 000.0 and US\$15.9 million, respectively. The remaining three of the five traditional export crops recorded reduced earnings— Citrus (Fresh Fruits), by 53.1 per cent to US\$383 000.0, Cocoa, by 23.3 per cent to US\$348 000.0 and Pimento by 45.7 per cent to US\$1.2 million. Coffee accounted for 85.5 per cent of total traditional agricultural commodities export earnings compared with 74.3 per cent in 2019.

Mining and Quarrying

Real Value Added for the Mining & Quarrying industry fell by 21.5 per cent relative to 2019 and accounted for 2.1 per cent of overall Gross Domestic Product. This contraction was attributed to a decrease in Alumina and Crude Bauxite



production. The decrease in Alumina production was the result of the JISCO Alpart plant not being operational during the year, compared with it being operational for nine months in 2019. Output of Crude Bauxite was impacted by lower demand from overseas

purchasers. Preliminary data showed that total export earnings fell by US\$814.5 million to US\$527.6 million. This out-turn stemmed from a decrease in the export value of Alumina and Crude Bauxite.

There was a downturn in the Quarrying sub-industry relative to 2019, with five of the nine minerals reporting a decline, one recording no production, while three increased. The performance of the sub-industry was consistent with reduced activity in the Construction industry.

Manufacturing



Real Value Added (RVA) for the Manufacturing industry contracted, recording a decline of 5.4 per cent compared with 2019. This was the largest annual decline since 1997 (6.6 per cent) and the lowest level of RVA since 2015 (Figure 12A). The industry

accounted for 9.1 per cent of Total RVA but detracted 0.5 percentage point from the change in total RVA. Lower output from the *Food, Beverages & Tobacco* (4.7 per cent) and *Other Manufacturing* (6.3 per cent) sub-industries resulted in this out-turn. The performance primarily resulted from factory closures and lower demand stemming from the effects of the Coronavirus Disease 2019 (COVID-19) and measures implemented to contain its spread nationally and internationally, which led to reduced demand from both markets. The decline was also reflected in lower sales of manufacturing goods. Consumer and business confidence also declined and, as a consequence, there was a contraction in employment in the industry.

Public and private sector entities continued work to implement initiatives to improve the business environment and the resources available for manufacturers. However, some policies and programmes envisioned and designed to bolster the ecosystem for Manufacturers had to be delayed or expedited to meet the events ushered in by the pandemic. The delivery of many initiatives also had to be transmitted via virtual platforms due to safety concerns which may have affected their impact and scope.

Construction

Real Value Added (RVA) for the Construction industry contracted by 0.8 per cent in 2020, representing the second consecutive year of decline, and accounted for 7.9 per cent of total RVA, 0.7 percentage point more than 2019. This performance reflected the general contraction of the



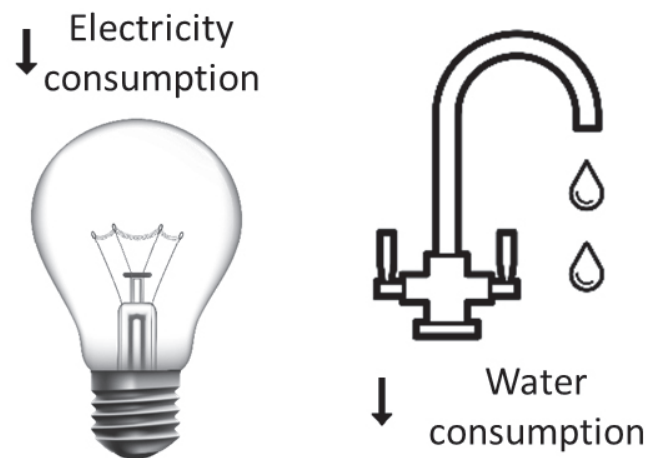
0.8%

- 2nd consecutive year of decline
- Accounted for 7.9% of Total RVA

economy, emanating from a reduction in the Building Construction category, which outweighed an increase in the Civil Engineering category. The contraction in Building Construction was a reflection of decreased activities associated with residential buildings, hotels and commercial office space.

The contraction in the industry was reflected in the performance of various construction inputs, including asphalt, which declined in sales, and limestone, whiting, shale, sand & stone, and marl & fill, which recorded reduced production. The reduction in the production and sales of some construction inputs stemmed from the completion of several major road infrastructure projects and the delayed construction of residential and commercial buildings. The average employment in the industry declined by 7.4 per cent to 100 033 persons compared with 2019. A further decline was tempered by an increase in the real sale of construction-related goods, which increased by 6.6 per cent, and the supply of cement to the domestic market, which grew by 11.8 per cent to 1 051 378.9 tonnes.

SERVICES INDUSTRIES



Energy, Electricity and Water

The Electricity & Water Supply industry declined by 5.8 per cent compared with 2019, reflecting lower electricity consumption and water consumption. The industry's performance was attributed to lower demand due to the negative impact of the COVID-19 pandemic and measures implemented to control its spread, which resulted in reduced commercial activity.

Electricity generation fell by 4.6 per cent to 4 227.4 GWh, reflecting a reduction of 42.8 per cent to 1 395.5 GWh in generation by Jamaica Public Service (JPS), which outweighed an increase of 42.3 per cent to 2 831.9 GWh in

output by Independent Power Producers (IPPs). Electricity sales decreased by 7.1 per cent to 3 034.7 GWh. JPS' revenue increased by 5.8 per cent to \$125.1 billion, while its customer base increased to 673 156 from 662 177.

Water production by the NWC increased by 4.8 per cent to 333 205.2 megalitres relative to 2019. Water consumption, however, declined by 2.0 per cent to 83 126.2 megalitres. Of the total water produced, approximately 75.1 per cent was non-revenue water (NRW) compared with 73.3 per cent in 2019. The number of new connections to the NWC's network increased by 1.7 per cent to 518 199 and the utility's revenue grew by 8.6 per cent to \$34.3 billion.

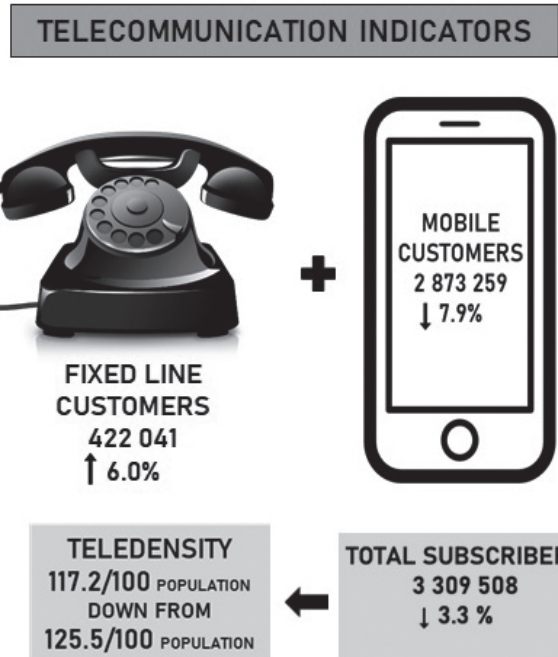
Transport, Storage and Communication

A 12.3 per cent contraction in RVA was recorded for the Transport, Storage & Communication industry in



2020 compared with 2019. The fallout stemmed from a reduction in RVA for both the Transport & Storage and Communication sub-industries and was mainly due to the debilitating effect the COVID-19 pandemic and associated measures had on the economy. With regard to the Transport & Storage sub-industry, there were contractions in the volume of domestic cargo handled at the islands seaports, by 16.9 per cent to 13 165 thousand tonnes (reflecting declines at both the Port of Kingston and the Outports); and passenger movement at the islands airports, by 66.0 per cent to 2 251 632, emanating from reduced passengers at all three international airports.

For the Communication sub-industry, the telecommunication segment recorded a decline of 7.9 per cent to 2.8 million mobile customers. This outweighed an increase of 6.0 per cent to 422 041 fixed line customers, resulting in a fallout of 6.2 per cent to 32.0 million in the total number of telephone subscribers. Accordingly, mobile penetration decreased from 110.6 per cent to 101.8 per cent and teledensity from 125.5/100 population in 2019 to 117.2/100 population in 2020.



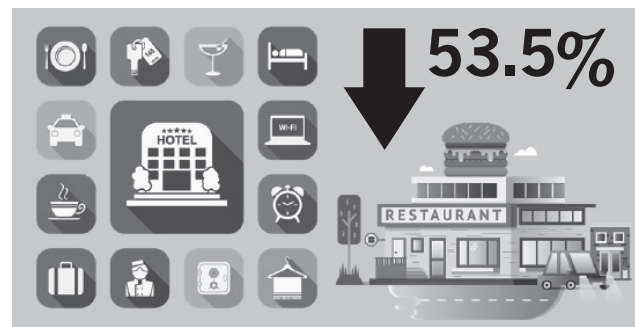
Finance & Insurance Services

RVA for the Finance & Insurance services industry recorded a contraction of 3.8 per cent relative to 2019, the first decline since 2012. Monetary Intermediation, Other Financial Intermediation and Insurance Services were impacted by the spread of the COVID-19 pandemic. Deposit-taking institutions earned less net interest income and generated lower revenue from fees and commissions due to fewer transactions and a shift to lower priced digital transactions. The General and Life Insurance sectors were negatively affected by reduced economic activity and reductions in employment levels.



Hotels & Restaurants

RVA for the Hotels & Restaurants industry declined by 53.5 per cent and accounted for 3.2 per cent of Total



RVA. This performance was attributed to the disruptive effect of COVID-19 on global travel, which led to a decrease in the number of Foreign Nationals that visited the island.

At the regional level, the Caribbean Tourism Organization reported a decline in tourist arrivals to all Caribbean destinations. Similarly, the United Nations World Tourism Organization estimated that global tourist arrivals contracted during 2020, representing the worst performance on record.

Cruise passenger arrivals fell by 71.1 per cent to 449 271 persons and was the result of a ban on cruise ship arrivals by the government in March to limit the spread of COVID-19. The number of ship calls to the island's main cruise ports fell from 478 to 158 calls.

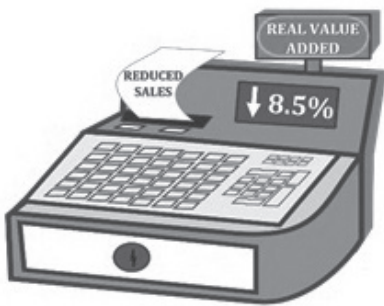
Provisional tourist expenditure totalled US\$1 362.4 million, a decline of US\$2 281.6 million compared with 2019. Stopover visitor's expenditure moved from US\$3 482.6 million to US\$1 316.9 million while cruise passenger expenditure was US\$45.5 million relative to US\$161.3 million in 2019. The average annual employment⁶ in the Accommodations and Food Service Activities industry group declined from a total of 108 033 to 90 800 persons, accounting for approximately 7.7 per cent of the total employed labour force.

The Restaurants component of the industry was estimated to have declined, as measures implemented (e.g. curfews, no in-house dining and physical distancing requirements) to slow the spread of COVID-19 led to a reduction in persons utilizing restaurants, bars and canteens.

Wholesale & Retail Trade; Repair & Installation of Machinery

The Wholesale & Retail Trade; Repair and Installation of Machinery (WRTRIM) industry recorded an 8.5 per cent decline in Real Value Added (RVA) and accounted for 17.5 per cent of total RVA in 2020.

The overall out-turn in the industry was negatively impacted by the COVID-19 pandemic through the measures used to mitigate the spread of the disease, including



nightly curfews and limits on gatherings. Subsequently, the industry's performance was impacted by an overall decline in economic activity, a reduced employed labour force; lower RVA in the related Goods Producing industries; reduced merchandise imports; and reduced consumer and business confidence. An examination of preliminary General Consumption Tax (GCT) data showed that there was a real decline of 11.4 per cent in total sales. This decrease in sales was due to a decline in seven of the eight categories, led by Textiles, Clothing, Shoes & Jewellery (30.4 per cent); Minerals, Fuels, Lubricants & Petroleum Products (26.6 per cent); and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores (15.3 per cent). Combined, the declining categories accounted for 89.4 per cent of total sales. A further decline in sales was curtailed by increased sales of 5.8 per cent for the category Hardware, Building Supplies, Electrical Goods & Machinery.

Micro, Small and Medium Enterprises

The Government of Jamaica continued to focus on introducing policies and programmes to enhance the competitiveness, innovation, and internationalization of Micro, Small and Medium Enterprises (MSMEs). Used as a proxy in measuring the contribution of MSMEs to the employed labour force, a review of Own Account Workers in the Labour Market Survey showed that Own Account Workers accounted for the second largest portion of the employed labour force. However, as one of the more vulnerable types of firms in the economy, the negative impact of COVID-19 was especially felt by these enterprises. This was reflected in the decline in sales and in the number of registered MSMEs that filed General Consumption Tax (GCT) returns.

Financing remains one of the main challenges faced by MSMEs. As gleaned from one study, *Assessing the Impact of the COVID-19 Pandemic on Jamaican Businesses (with an emphasis on MSMEs)*, financing remained a challenge, with firms seemingly not opting to utilize some sources of financing and financiers possibly hesitant to lend. This was due to the seemingly higher risk of non-repayment caused by the impact of the pandemic. The largest number of MSMEs continue to operate within the Wholesale and Retail Trade and Repair of Motor Vehicles category, followed closely by Real Estate, Renting & Business Activities.

The surveys of Business Confidence and Consumer Confidence showed that businesses and consumers were

6. Average Employment represents data for July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for July and October.

showing less optimism for present and future economic conditions. Business confidence declined relative to 2019, with the Business Confidence Index registering an average of 120.5 points compared with 143.6 in 2019. There was a decline of 30.1 points to 150.1 points in the average Index of Consumer Confidence relative to 2019.

Entertainment & Sports



The Other Services industry—of which the Recreational, Cultural and Sporting Activities (RCS) sub-industry represents the largest share—recorded a decline of 23.5 per cent in RVA. The performance of the industry was negatively affected by measures implemented to stem the spread of COVID-19. Those measures resulted in the cancellation of a number of entertainment and sporting events and a decline in tourist-related activities.

Revenue earned by the Palace Amusement Company was \$919.6 million compared with \$1 112.6 million in 2019. The total revenue collected by Municipal Corporations decreased from \$81.1 million to \$16.4 million. The stock of Loans and Advances to the Entertainment Industry at Commercial Banks totalled \$2 494.2 million, a decline of \$255.4 million compared with 2019. Total income collected by the Sports Development Foundation increased to \$622.5 million from \$543.4 million in 2019, while total expenditure decreased from \$639.3 million from \$562.7 million.

THE SOCIAL SECTOR

DEMOGRAPHICS AND THE LABOUR MARKET

Population

There has been a declining trend in Jamaica's population average annual rate of growth, reaching zero growth (0.0 per cent) for the first time in 2017. Jamaica's zero average annual rate of growth continued in 2020. At the end of the year, the population was estimated at 2 735 400. Births and

deaths were estimated at 33 800 and 18 100, respectively. This resulted in a natural increase of 15 700. Emigration accounted for a loss of 18 000⁷ persons.

Jamaica continues to move towards the advanced stage of the demographic transition, a direct consequence of transitioning from high to low fertility and mortality rates. The 0–14 age group has been declining while the working age group (15–64 years) and the dependent elderly (65+ years) have been increasing.

Chronic diseases continue to be a major public health burden in the country. Non-Communicable Diseases (NCDs) such as cardiovascular disease, cancers and diabetes are among the leading causes of death in Jamaica. New and emerging communicable diseases have been increasing morbidity and mortality rates in recent years. In spite of these, however, life expectancy continues to increase.

The legislative and policy frameworks for monitoring international migration include the Immigration Restriction (Commonwealth Citizens) Act, 1945 and the National Policy on International Migration and Development (IMD), 2017. The Policy “seeks to ensure that international migration is adequately measured, monitored and influenced to serve the development needs of the country” as outlined in the Vision 2030 Jamaica – National Development Plan. As a result, Jamaica has sought to mainstream migration into national development planning by including migration and development priorities in the 2018–2021 Medium Term Socio-Economic Policy Framework (MTF).

Work was advanced in the revision of the 1995 National Population Policy. The draft Policy was tabled in Cabinet for approval as a Green Paper. Amendments were recommended and are being incorporated.

Work to integrate divorce data into the Registrar General's Department and to train health professionals in the coding of deaths was undertaken. The impact of COVID-19 on mortality, fertility and migration is to be assessed given the early stage of the spread of the disease in the country.

Labour Market

The labour force averaged 1 314 033 persons, reflecting a decrease of 34 967 persons relative to 2019. The reduction in the labour force coincided with a 4.7 per cent increase in persons outside the labour force (772 233).

The number of employed persons declined by 5.2 per cent to an average 1 180 500 as the pandemic affected

7. Statistical Institute of Jamaica, Population Projections Jamaica 2000–2050 (Kingston: STATIN, 2008).

Net External Movement is a proxy measure for Emigration and is based on movements of Jamaican nationals to and from the island in any given year, 2006–2018. The estimate for 2019 and 2020 was based on population projections.

economic activity. Employment in the Goods Producing Industry contracted by 4.0 per cent, while the Services Industry recorded a 5.7 per cent decrease in employment. The Services Industries accounted for 69.0 per cent of total employment.

The unemployment rate averaged 10.2 per cent compared with 7.7 per cent in 2019. The youth unemployment rate registered an average 25.7 per cent, as the unemployed youth population increased by 21.1 per cent to 51 233.

HUMAN DEVELOPMENT, WELFARE AND CULTURE

Education and Training

The continued implementation of policies and programmes within the education sector was advanced by the Government of Jamaica to facilitate the achievement of the goals articulated in Vision 2030 Jamaica – National Development Plan. The majority of the activities in the education sector was centred on providing access to quality education and training in light of the COVID-19 pandemic. The continuation of teaching and learning through multiple media platforms was crucial to ensure that advances made were not significantly disrupted.

Enrolment in the 3–24 years cohort was an estimated 671 739 students, an increase of 25.7 per cent compared with the previous year. End-of-term examinations were modified in response to the effects of the pandemic. A modified psychometrically approved assessment tool was administered to over 39 000 students registered to sit the Primary Exit Profile examination for matriculation to high schools. At the secondary level, the Caribbean Examination Council (CXC) authorized the modification of examinations which included the administration of Paper 01 (multiple choice) and Paper 03 (alternative to the school-based assessment).

Continued focus was placed on the professional development of educators at all levels through specialised education and training courses. Training was provided to approximately 22 000 educators in the use of four Learning Management Systems (LMS) as they transitioned from face-to-face teaching and learning to online platforms and other non-traditional media. The Human Employment and Resource Training /National Service Training Agency Trust (HEART/NSTA Trust) recorded an increase in enrolment for the review year. Over 3 500 public sector employees received quality training and leadership development options through the Management Institute for National Development (MIND). In the area of policy, the Special Education Policy is being revised for resubmission to Cabinet.

Under the Japan funded Inter-American Development Bank (IDB) Technical Corporation (TTC) Project— Education Sector Transformation Plan Learning and Teaching,—Phase I of the Alternative Programme for Exceptional Learners (APEX) was implemented and a National School Leaving Certificate mobile application developed.

Health

The novel coronavirus, SARS-nCoV2 (the virus that causes COVID-19), which emerged in 2019, greatly impacted health-care systems and services during the year. The first case of the virus was confirmed on March 10, 2020. At the end of December 2020, some 12 915 persons tested positive, 303 deaths were recorded and 313 persons were in quarantine facilities. Health-care delivery for other health services was scaled down due to mandatory restrictions imposed by the government. This included cancellation of clinics, resulting in a reduction in outpatient service, elective surgeries and population screening programmes. Due to the interruption in services, hospital admissions declined by 22.4 per cent and visits to health centres by 13.0 per cent. The least number of visits to hospitals and clinics was recorded in April. Due to the stay at home orders, provisions were made by the Ministry of Health and Wellness (MOHW) for home delivery of pharmaceuticals for patients with chronic diseases. Measures to enhance services both in primary and secondary care included the provision of community-based care, the redeployment of staff and mobile clinics for pharmacy services. A mental health programme was also implemented in response to various psychosocial issues emerging from the pandemic. Other major achievements during the year were the completion of the HIV sustainability plan and development of the draft strategic plan for Information Systems for health.

Social Development, Social Protection & Culture

Actions to further social development for all citizens took place within the framework of Vision 2030 Jamaica, and were reinforced by the country's recognition of, and ongoing commitment to achieving the global Sustainable Development Goals and the 2030 Agenda. Resources were directed to expanding social inclusion and improving the delivery of social services, in particular to vulnerable population groups. Key policy and programmatic responses to deal with the immediate socio-economic impact of the COVID-19 pandemic were implemented in all areas. The care and protection of the nation's children remained a priority, as evidenced by the full implementation of plans and programmes addressing violence against children. Access to training and certification of youth in skills training programmes, as well as job placement and

volunteerism, were mechanisms through which the youth cohort were engaged in national development. Economic and social inclusion of persons with disabilities and the elderly were advanced through legislative and policy frameworks.

Two Codes of Practice to support the Disabilities Act were finalized, while the public consultation phase for the revised Green Paper on the National Policy for Senior Citizens was advanced during the year. Gender mainstreaming across government and civil society organizations, and efforts to further address gender-based violence and sexual harassment remained priorities for development. Social protection interventions continued throughout the period, and were integral in lessening the negative impacts of the pandemic. The social protection landscape continued to benefit from support from international development partners, particularly in the areas of infrastructure and capacity improvement. Initiatives in community development continued to focus on the improvement of social and physical infrastructure in a number of communities islandwide. In the area of culture, focus was placed on promoting and sustaining historic legacies through several agencies, despite restrictions brought on by the pandemic.

National Security and Justice

The onset of the COVID-19 pandemic impacted the ability of the government to implement some planned programmes and projects however, as the information and communication technology capacity of the various entities in the security and justice sector was enhanced, they were able to utilize various virtual channels to maintain access to services. The ability to undertake planned activities was also impacted by a reduction in budgetary allocation,

as resources had to be diverted to aide in the GOJ's programme to manage the pandemic.

The Medium-Term Socio-Economic Policy Framework 2018–2021, under the Vision 2030 Jamaica – National Development Plan continued to guide actions in the security and justice sectors, as increasing the levels of safety and security was still a major thrust for the government. The government continued to employ a mix of strategies which included: policy and programme development; policing; social intervention; legislative reform; physical infrastructure development; and technological improvements. A number of social intervention programmes were undertaken targeting vulnerable groups and communities. The Citizen Security and Justice Programme came to an end after 19 years of operation, while the Citizen Security Secretariat was established to manage implementation of the Citizen Security Plan. There was a 5.6 per cent reduction in the total number of reported crimes. Category 1 crimes and murders declined by 8.7 per cent and 1.2 per cent, respectively.

The government continued to increase access to justice services through the improvement of the physical infrastructure and technological capacity of courts islandwide, while social justice services were provided through the restorative justice and the child diversion programmes, and the Victim Services Division. The country continued to see an improvement in the rates of backlog cases in the island's courts, which moved from 32.0 per cent at the end of 2016 to 8.9 per cent at the end of 2020. However, the Case Disposal and Case Clearance Rates declined. The legislative landscape was also strengthened with a number of Acts being passed or amended. There were also other pieces of legislation at various stages of the process. ■

**ECONOMIC AND
SOCIAL
SURVEY
JAMAICA
2020**

Published by



THE INTERNATIONAL ECONOMY

THE INTERNATIONAL ECONOMY

INTRODUCTION



World output, as measured by real Gross Domestic Product (GDP), contracted by an estimated 3.3 per cent relative to 2019.¹ This downturn stemmed from the emergence of the novel Coronavirus Disease 2019 (COVID-19) which led to a severe public

health crisis that rapidly spread across regions due to global interconnectedness (Figure 1A). Health policy responses at the national, regional, and local levels were designed to slow transmission and flatten the curve, given the burden placed on medical facilities.

In addition to the adverse impact on public health, the pandemic and the measures implemented to flatten the curve caused a significant economic shock globally. Containment measures taken by governments resulted

in reduced demand, supply-chain disruptions and labour market contractions, and had a greater impact on the contact-intensive and travel services. The impact of COVID-19 varied not only across industries, but also across social groups, having a more acute effect on the elderly, women, youth, the poor, and persons informally employed. In line with these developments, global economic output decreased, as both Advanced Economies and Emerging Market & Developing Economies (EMDEs), registered contractions in real GDP. The International Monetary Fund (IMF) noted that of the 194 countries on which it collects data, 166 recorded a decline in GDP during the year.

The international community responded quickly amid growing economic and financial risks and the understanding that global political cooperation was required to stem the spread of the pandemic. The United Nations initiated a comprehensive health response, guided by the World Health Organization (WHO), to suppress the transmission of the virus, reduce mortality of those affected, and develop safe and effective vaccines that can be

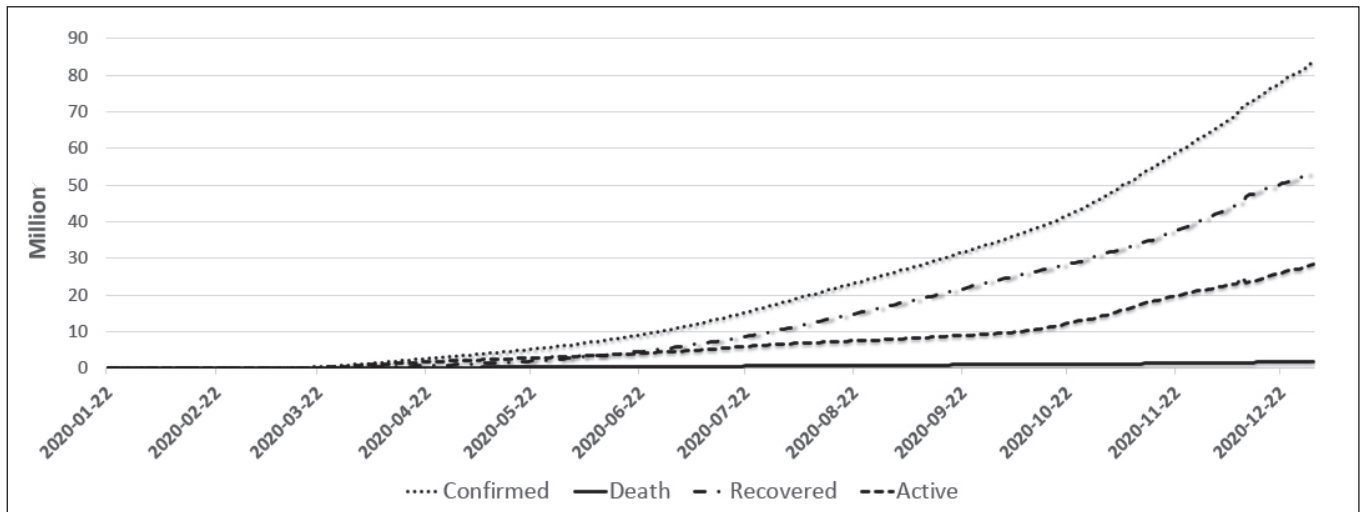


FIGURE 1A: CUMULATIVE GLOBAL COVID-19 CASES, 2020

1. International Monetary Fund, World Economic Outlook (January 2021)

delivered at a wide scale. Increased financing by the World Bank Group targeted the poor and was aimed at improving development outcomes. The International Monetary Fund (IMF) supported countries on the path to recovery by providing policy advice, financial support, capacity development, and debt relief for the poorest. Recognising the importance of trade in addressing the pandemic, the World Trade Organization (WTO) called on countries to remove export restrictions especially for essentials such as health supplies and food.

At the national level, initiatives were supported by stimulus actions by governments—within Advanced Economies and to a lesser extent EMDEs—which adopted a broad set of policies and programmes to cushion income losses, encourage consumption and protect firms. Various counter-fiscal measures implemented included tax relief programmes, extended unemployment benefits, grants to small enterprises, loan forgiveness programmes, compensation schemes for furloughed workers, deferred tax and loan payments, and funding allocated for testing and vaccination development. Among the monetary initiatives used by central banks were expanded asset purchase programmes, reduced reserve requirements, central bank purchases of securities and loans, reduced lending rates, and reduced rates on central bank liquidity swaps.

With regard to commodity markets, the pandemic had the largest impact on oil prices. The restrictions imposed on both domestic and international travel, combined with a decline in production in many countries, resulted in decreased demand and price for crude oil. In general, non-energy commodity prices were not directly impacted. Increased demand, particularly from China, and lower output were among the factors accounting for the upward movement in prices for metals, agricultural products and fertilizers.

INTERNATIONAL ECONOMIC CONDITIONS

World Output

During 2020, a significant reduction in global economic activity was triggered by the onset of the pandemic. By mid-March, most governments were faced with the challenge of carefully weighing the impact of implementing a public health response aimed at containing the spread of the novel virus and its consequences on economic activity. Measures implemented across the globe to varying degrees included physical distancing, border closures, quarantines, school closures, work-from-home

arrangements, reduced work hours, curfews, and travel restrictions. The resulting conditions created uncertainty, which was manifested in weakened business and consumer confidence, as well as lower economic activity especially in the service oriented sectors of travel, tourism, arts and entertainment. As a consequence, many economies across the world experienced reductions in employment and work hours, subdued trade activity, lower industrial production, and increased fiscal expenditure. By June, several governments had begun a cautious reopening of their economies, facilitating an improvement in economic out-turn. However, in the latter half of the year, rising infection rates, the emergence of new variants of the virus and logistical challenges of vaccine programmes led to renewed restrictions.

Output of Advanced Economies contracted by 4.7 per cent. In the United States of America (USA), real GDP declined by 3.5 per cent, derived from reductions in personal consumption, private investments and exports of goods and services (Table 1.1a). The decline in personal consumption expenditure reflected lower spend on services, primarily food, accommodation, healthcare and recreation. A further contraction was tempered by increased levels of housing investment and public expenditure. Higher public expenditure was driven by an increase in non-defense consumption expenditure geared towards mitigating the impact of the virus on the population. During the year, the US Congress passed several key pieces of legislation² designed to, among other things, provide one-time cash payments, increase unemployment benefits, make available forgivable loans to firms, and additional funds for state and local governments. Funds were also provided for testing, vaccine research, medical supply procurement, as well as for the evacuation of US embassies and departments overseas.

Within the Euro Area, output was estimated to have decreased by 6.6 per cent. Early spring lockdowns and associated disruptions in supply chains along with lower demand led to a record collapse in economic activity. As the first wave of the disease subsided, most European countries began to reopen their economies, which eased the economic pressure of the pandemic. However, reopening resulted in a resurgence in infections, which along with the emergence of more contagious variants of COVID-19, forced many member states to reintroduce or tighten containment measures. Consequently, all member states recorded lower GDP out-turns for calendar year 2020. Across Europe, governments deployed fiscal and monetary measures to assist vulnerable households, decrease the risk of business failures and reduce unemployment. These were subsequently complemented by measures approved by the

2. These included the Coronavirus Aid, Relief, and Economic Security (CARES) Act, 2020 and the Consolidated Appropriations Act, 2021.

TABLE 1.1a
ANNUAL PER CENT CHANGE IN GLOBAL OUTPUT, 2016–2021

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	2021 ^{proj}
REAL GDP						
World Output	3.3	3.8	3.6	2.8	-3.3	6.0
Advanced Economies	1.8	2.5	2.3	1.6	-4.7	5.1
United States of America	1.7	2.3	3	2.2	-3.5	6.4
Canada	1.0	3.0	2.4	1.9	-5.4	5.0
Japan	0.8	1.7	0.6	0.3	-4.8	3.3
Euro Area	1.9	2.6	1.9	1.3	-6.6	4.4
Germany	2.2	2.6	1.3	0.6	-4.9	3.6
France	1.1	2.3	1.9	1.5	-8.2	5.8
Italy	1.3	1.7	0.9	0.3	-8.9	4.2
Spain	3.0	3.0	2.4	2.0	-11.0	6.4
United Kingdom	1.7	1.7	1.3	1.4	-9.9	5.3
Other Advanced Economies	2.2	2.8	2.4	1.8	-2.1	4.4
Emerging Market & Developing Economies	4.5	4.8	4.5	3.6	-2.2	6.7
Emerging & Developing Asia	6.8	6.6	6.4	5.3	-1.0	8.6
China	6.9	6.9	6.7	5.8	2.3	8.4
India	8.3	6.8	6.5	4.0	-8.0	12.5
Emerging & Developing Europe ^a	1.9	4.1	3.4	2.4	-2.0	4.4
Middle East and Central Asia ^a	4.7	2.5	2.00	1.4	-2.9	3.7
Latin America & the Caribbean	-0.6	1.3	1.2	0.2	-7.0	4.6
Sub-Saharan Africa	1.5	3.1	3.2	3.2	-1.9	3.4

a – As of October 2019 WEO, the regional group Commonwealth of Independent States (CIS) is discontinued. Belarus, Moldova, Russia, and Ukraine have been added to Emerging and Developing Europe. Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyz Republic, Tajikistan, Turkmenistan, and Uzbekistan, which comprise the regional subgroup Caucasus and Central Asia (CCA)—have been combined with Middle East, North Africa, Afghanistan, and Pakistan group to form the new regional group Middle East and Central Asia (MECA).

p - preliminary

proj - projections

r - revised

Source : IMF - World Economic Outlook, April 2021

European Council and European Central Bank (ECB).³

The United Kingdom (UK) experienced a 9.9 per cent decline in real GDP (see Table 1.1a). This out-turn reflected record declines for the services, production and construction sectors. Weakened demand, the closure of businesses, and the observance of physical distancing measures accounted for the downturn. Within the services sector, the greatest declines were recorded for Distribution, Hotels & Restaurants and Transport, Storage & Communications.

The world's third largest economy, Japan, shrank by 4.8 per cent, its first contraction since 2009. Economic contraction stemmed primarily from weakened domestic demand which accounted for more than half of the Japanese economy. The decline in demand was due to the lingering adverse impact of a 2019 consumption tax increase, as well

as domestic measures implemented to curtail the spread of COVID-19. A contraction in exports, also contributed to the fall in economic activity.

Canada registered an estimated contraction of 5.4 per cent which was a function of lower domestic and external demand along with lower commodity prices. The lower output reflected a decrease in household consumption expenditure, particularly the spend on services. Additionally, business investment in machinery & equipment, non-residential structures and intellectual property products declined.

Output in EMDEs fell by 2.2 per cent. Real GDP of China, the largest economy within this group, grew by 2.3 per cent. Its growth for 2020 was the lowest in four decades (44 years) and stemmed from the drag of COVID-19

3. Among the measures implemented by the ECB was the Pandemic Emergency Purchase Programme with an envelope of €1 850 billion. The Programme aimed to lower borrowing costs and increase lending to citizens, firms and governments in the Euro Area.

TABLE 1.1b
ANNUAL PER CENT CHANGE IN GLOBAL TRADE, 2016–2021

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	2021 ^{proj}
TRADE IN GOODS AND SERVICES^a						
World Trade Volume (goods & services)	2.3	5.6	3.9	0.9	-8.5	8.4
Exports (volume)						
Advanced Economies	2.0	4.8	3.6	1.3	-9.5	7.9
Emerging & Developing Economies	2.8	6.5	3.9	0.5	-5.7	7.6
Imports (volume)						
Advanced Economies	2.6	4.8	3.7	1.7	-9.1	9.1
Emerging & Developing Economies	1.7	7.4	4.7	-1.0	-8.6	9.0

a – Simple average of growth rates of trade volumes

p – preliminary

proj – projections

r – revised

Source : IMF - WORLD ECONOMIC OUTLOOK, April 2021

on the economy. Economic expansion was attributed to increased industrial production in the Mining; Production and Supply of Electricity, Thermal Power, Gas and Water; and Manufacturing industries. Further growth was constrained by a contraction in Retail Sales and the flat performance of the Services industry.

World Trade

Consistent with the decline in economic activity, global trade also fell, with trade volumes of both Advanced Economies and EMDEs decreasing (Table 1.1b). Data indicated that the trade in goods and services contracted as the effects of the pandemic began to be felt. Travel services were hit particularly hard given border closures and travel restrictions, which also adversely impacted cargo shipping and disrupted supply chains. In contrast, COVID-19 related medical products inclusive of personal protective equipment, ventilators and sanitizers, recorded an increase in trade. Increases were also recorded for home office equipment such as laptops, Wi-Fi routers and portable storage.

Global export of goods and services was valued at US\$22 062.0 billion, a decline of 10.4 per cent. Of this total, the value of Goods was US\$17 191.0 billion, which was US\$1 371.0 billion lower due to the reduction in demand and prices. In the case of Services, exports totalled US\$4 891 billion, a decrease of US\$1 159.0 billion relative to 2019.

The Terms of Trade of Advanced Economies increased by 1.0 per cent, reflecting an increase in the price of manufactured goods (particularly health and computer-related equipment) relative to the price of commodities. For EMDEs, the Terms of Trade fell by 0.5 per cent, due to the fall in the price of crude oil and other primary commodities

(the main export of these economies) relative to the price of higher valued goods.

Inflation

Relative to 2019, the general level of prices were higher in most countries. Inflation was driven by COVID-19 induced supply disruptions combined with increased demand for some products as consumers stockpiled food, medical and cleaning supplies. Further price increases were, however, tempered by reduced demand for some non-essential goods and services. This was against the background of reduced employment and work hours, lockdowns and physical distancing measures.

Headline inflation averaged 0.7 per cent for Advanced Economies, which was generally below central banks' policy targets, indicating the existence of output gaps in these economies. Inflation in the USA averaged 1.2 per cent, the highest among this group of countries (Table 1.2). This inflation out-turn reflected higher prices for food, medical care and shelter. For Japan, inflation of 0.0 per cent was recorded as lower energy prices countered higher prices for food, housing, clothes and medical care.

Inflation averaged 5.1 per cent for EMDEs. By region, average rates in Emerging & Developing Europe, Emerging & Developing Asia, and Latin America and the Caribbean all declined. Inflation in the Middle East & Central Asia averaged 10.2 per cent, which was 2.8 percentage points higher than 2019. Conflicts and economic crises in Afghanistan, Libya, Somalia, Syria, and Yemen accounted for this increase. Similarly, the inflation out-turn in Sub-Saharan African was higher relative to 2019. This reflected the impact of currency depreciation and COVID-19 related disruptions to food imports.

TABLE 1.2
ANNUAL AVERAGE PER CENT CHANGE IN CONSUMER PRICES, 2016–2021

	2016	2017	2018 ^r	2019 ^r	2020 ^p	2021 ^{proj}
Advanced Economies	0.7	1.7	2.0	1.4	0.7	1.6
United States of America	1.3	2.1	2.4	1.8	1.2	2.3
Japan	-0.1	0.5	1.0	0.5	0.0	0.1
Germany	0.4	1.7	1.9	1.4	0.4	2.2
France	0.3	1.2	2.1	1.3	0.5	1.1
Italy	-0.1	1.3	1.2	0.6	-0.1	0.8
United Kingdom	0.7	2.7	2.5	1.8	0.9	1.5
Canada	1.4	1.6	2.3	1.9	0.7	1.7
Emerging Market & Developing Economies	4.3	4.4	4.9	5.1	5.1	4.9
Emerging & Developing Europe	5.5	5.6	6.4	6.6	5.4	6.5
Emerging & Developing Asia	2.8	2.4	2.7	3.3	3.1	2.3
Middle East & Central Asia	5.7	6.9	9.5	7.4	10.2	11.2
Latin America & the Caribbean	5.5	6.3	6.6	7.7	6.4	7.2
Sub-Saharan Africa	10.4	10.7	8.4	8.5	10.8	9.8

p – preliminary
proj – projections
r – revised

Source : IMF - WORLD ECONOMIC OUTLOOK, April 2021

Global Employment Trends

Globally, labour markets experienced unprecedented disruptions given varying degrees of lockdown which resulted in workplace closures for many workers with the exception for those deemed essential. The impact on labour markets globally was as follows:

- Reduction in work hours – The number of work hours lost during the pandemic was estimated to be four times greater than during the global financial crisis.⁴ This decrease was due to the combined impact of employment loss and a reduction in work hours for those who remained employed. Latin America,

Southern Europe and Southern Asia were the regions which experienced the greatest loss in work hours.

- Employment loss – In contrast to the 2008 global financial crisis, the fall in global employment was mainly due to inactivity⁵ (71.0 per cent) rather than unemployment which accounted for the remainder. An additional 81 million persons became inactive as the prospects of gaining employment during the pandemic were low. This led to a decrease in the global labour force participation rate. Global unemployment increased by 1.1 percentage points to 6.5 per cent, translating to 33 million persons. Across regions and income groups employment losses were greater for

TABLE 1.3
UNEMPLOYMENT RATE FOR ADVANCED ECONOMIES, 2016–2020

	2016 ^r	2017	2018 ^r	2019 ^r	2020 ^p
UNEMPLOYMENT RATE (per cent)					
Advanced Economies	6.2	5.6	5.1	4.8	7.3
United States of America	4.9	4.4	3.9	3.7	8.9
Japan	3.1	2.8	2.4	2.4	3.3
Euro Area	10.0	9.1	8.2	7.7	8.9
Germany	4.2	3.8	3.4	3.1	4.3
France	10.0	9.4	9.0	8.5	8.9
Italy	11.7	11.3	10.6	9.9	11.0
United Kingdom	4.9	4.4	4.1	3.8	5.4
Canada	7.0	6.3	5.8	5.7	9.7

p - preliminary
r - revised

Source : IMF - World Economic Outlook Database, October 2020

4. ILO Monitor: COVID-19 and the World of Work 7th edition

5. The inactivity rate is the proportion of the working-age population that is not in the labour force.

- women than for men.
- Labour income loss – Given the increases in labour inactivity and unemployment, global labour income was estimated to have decreased by 8.3 per cent relative to 2019. By income group, the loss in income was highest in lower middle-income countries, and by region it was greatest in the Americas.
- Increased use of digital platforms to conduct work that led to a proliferation of remote-working arrangements
- These digital platforms transformed labour processes and facilitated increased digital connections of firms, workers, and consumers.

Within the group of Advanced Economies the unemployment rate was estimated at 7.3 per cent relative to 4.8 per cent during 2019. For these economies, the increased rates reversed a trend of declining rates recorded for the last five years (Table 1.3).

INTERNATIONAL TRADE DEVELOPMENTS

World Trade Organization (WTO)

The WTO continued its efforts to facilitate smooth predictable and free trade flows. This, despite the absence of a dispute settlement body—the Appellate Body, which no longer operated, as there was only one remaining judge.⁶ Towards this end, WTO members participating in the negotiation of rules on e-commerce continued their work to streamline the negotiating text. With few international rules to facilitate cross-border electronic commerce (unlike for goods and services), the team signalled encouraging progress on matters including electronic signatures and authentication, consumer protection and spam.

Additional developments during the year were as follows:

- the commemoration of its 25th anniversary through the hosting of a series of speeches and panel discussions which facilitated consideration of the organisation’s achievements and challenges.
- IMF and WTO issued a joint call for governments to refrain from imposing and lifting where implemented, export and other trade restrictions on medical supplies and food, given the importance of trade in saving lives and livelihoods in the midst of the global health and economic crisis. To complement the call, the WTO

Secretariat published a new information note on trade-related issues for COVID-19 vaccine production, manufacturing and deployment. The note, entitled “Developing and delivering COVID-19 vaccines around the world,” explores how trade policy can play its part in ensuring the rapid roll-out of vaccines against COVID-19.

Organisation of African Caribbean and Pacific States (OACPS)

In December, the chief negotiators from the European Union (EU) and the OACPS, formerly known as the African Caribbean and Pacific (ACP) Group of States, reached a political deal on the text for a new Partnership Agreement that will succeed the Cotonou Agreement.⁷ It provides a framework for future ACP-EU relations given the end of the Cotonou Partnership which expired during the year. The Agreement, which must be approved, signed and ratified by the parties, will cover a large number of areas, ranging from sustainable development and growth, to human rights, peace and security and will be geared to empower each region. Once in effect, the Agreement will serve as the new legal framework and guide political, economic and cooperation relations between the EU and 79 members of the OACPS for the next 20 years.

Caribbean Community (CARICOM)

The 31st CARICOM Intersessional Meeting and the 41st Meeting of the Conference of Heads of Government was held during the year. Among the matters discussed at the two meetings were the progress of the implementation of the CSME within the context of financial and human resource constraints; a regional approach to COVID-19 through efforts spearheaded by Caribbean Public Health Agency (CARPHA); the escalation of Non-Communicable Diseases in particular heart disease, which accounted for the highest percentage of deaths within the group of NCDs in the region; and relatively high crime rates, with an agreement to address the matter as a public health issue. CARICOM also continued its advocacy against the blacklisting of its Member States by the European Union (EU). Blacklisting influences strategies of international banks and has resulted in reputational damage to regional financial institutions. The crippling effects of de-risking⁸

6. The WTO Appellate Body requires a quorum of three.

7. The Cotonou Agreement was the overarching framework for EU relations with ACP countries. It was adopted in 2000 to replace the 1975 Lomé Convention. The Cotonou Agreement aimed to reduce and eventually eradicate poverty and contribute to the gradual integration of ACP countries into the global economy. The Agreement was initially due to expire in February 2020, but was extended to December 2020 as negotiations on the future agreement were not completed on the initial end date.

8. Derisking refers to the phenomenon of financial institutions terminating or restricting business relationships with categories of clients are considered high-risk.

and the withdrawal of correspondence banking have threatened the economic security of member-states.

CARIFORUM-European Union (EU) Economic Partnership Agreement (EPA)

The 26th meeting of the Council of Ministers of CARIFORUM was held during the year. Included in the matters addressed were BREXIT, Post-Cotonou Negotiations, Implementation of the CARIFORUM-European Union Economic Partnership Agreement (EPA), CARIFORUM-EU EPA review, CARIFORUM EU Development Cooperation and CARIFORUM Institutions.

Work continued on the 2nd review of the CARIFORUM-EU Economic Partnership Agreement (EPA). These reviews are intended to determine the impact of EPA on the participating countries, including costs and consequences of implementation, which could lead to amendment of provisions in the Agreement. Additionally, with Brexit, the EPA would thereafter be with 27 EU Member States, some of which have no historical economic or social ties to the members of CARIFORUM. As such, a review facilitates the consideration of strategies to strengthen the relationship with the remaining members of the EU.

Brexit

The UK ended its 47-year membership in the European Union on January 31, 2020. This began a transition period to the UK's and EU's new relationship that ended December 31, 2020. Subsequent to eight months of negotiations, the EU-UK and Cooperation Agreement was signed on December 30, 2020. The Agreement governs the relationship between the two parties and provides preferential arrangements in areas such as trade in goods and in services, digital trade, intellectual property, public procurement, aviation and road transport, energy and fisheries. It also provides for cooperation mechanisms in a range of policy areas, including social security coordination, law enforcement and judicial cooperation in criminal matters, as well as the UK's participation in some EU programmes. Having been ratified by the UK Parliament in December 2020, the Agreement awaits ratification by the European Parliament and the Council of the European Union⁹ before it formally comes into effect.

US–Mexico–Canada Agreement (USMCA)

The US-Mexico-Canada Agreement (USMCA)¹⁰ is a free trade agreement between the named parties. Following notification by all three governments that the provisions were ready for domestic implementation, the Agreement came into effect on July 1, 2020. The USMCA replaced the North American Free Trade Agreement (NAFTA) but preserves key elements of the long-lasting trading relationship among the three countries and incorporates new and updated provisions that seek to address 21st-century trade issues.

INTERNATIONAL COMMODITY MARKETS

The COVID-19 pandemic had an impact on commodity markets, affecting both demand and supply. Most adversely affected were energy markets, stemming from a fall in travel. This was reflected in the World Bank's Energy Price Index which fell by 31.6 per cent. In contrast, the price index for Non-Energy commodities increased by 2.9 per cent. Within the group of Non-Energy commodities, weather-related shocks and increased demand led to an upward movement in agricultural prices.

For 2020, the average spot price of crude oil was US\$41.26/barrel relative to US\$61.41/barrel recorded during 2019 (Table 1.4). Downward pressure on oil prices reflected the impact of:

- a slowing in demand as a result of a downturn in global travel brought about by border closures, lockdowns and curfews implemented to curb the spread of the COVID-19. Also contributing to the fall in oil prices was the lower level of output, as many economies operated below pre-pandemic levels of production. As a consequence, global oil demand was estimated to have fallen by 9.6 per cent in 2020 to 90.34 million barrels per day.
- a breakdown in negotiations among OPEC+¹¹ members during early March 2020 as Russia and Saudi Arabia were unable to agree to proposed production cuts. While Saudi Arabia argued for deeper cuts in production, Russia refused this proposal arguing that such cuts would not positively impact prices given the impact COVID-19 was having on demand. With the breakdown in negotiations, Saudi Arabia reacted by increasing supply to the market. This further exacerbated expectation of price declines and led to the lowest monthly average price recorded by the World Bank in April—the lowest since 2002. The average spot price of crude oil averaged US\$21.04/barrel, 65.8 per

9. The Council of the European Union is one of three legislative bodies of the European Union and together with the European Parliament serves to amend and approve the proposals of the European Commission, which holds legislative initiative.

10. USMCA is sometimes referred to by its Canadian English title Canada-United States-Mexico Agreement (CUSMA).

11. OPEC+ is comprised of OPEC members and Azerbaijan, Bahrain, Brunei, Kazakhstan, Malaysia, Mexico, Oman, Russia, Sudan, and South Sudan.

cent lower than recorded in January 2020 (Figure 2A). During April 2020, the OPEC+ alliance subsequently agreed to cuts of 9.7mdd which triggered a partial increase in prices. However, prices remained below the average at which the year started given reduced demand conditions engendered by the pandemic.

The out-turn in the movement of coffee prices was mixed. While the price of Coffee Arabica increased by 15.4 per cent to US\$3.32/kg, the price of Coffee Robusta fell by

6.5 per cent to US\$1.52/kg. Weather-related disruptions and pandemic-related labour restrictions in Brazil, the world's largest producer of Arabica, were the main factors which contributed to the increase in prices. Also contributing was increased demand associated with panic buying as consumers stockpiled their personal supplies of coffee against a background of COVID-19 stay-at-home measures. In contrast, coffee Robusta prices were lower due to increased supply, in part, as result of increased exports

TABLE 1.4
SELECTED COMMODITY PRICE DATA, 2016-2020
(US\$)

Commodity	Price per unit	2016	2017	2018	2019	2020	% Change 2020/2019
Crude Oil (Average Spot)	\$/bbl	42.81	52.81	68.35	61.41	41.26	-32.8
Coffee, Arabica	\$/kg	3.61	3.32	2.93	2.88	3.32	15.4
Coffee, Robusta	\$/kg	1.95	2.23	1.87	1.62	1.52	-6.5
Bananas, EU	\$/kg	0.91	0.90	0.95	0.88	0.90	2.4
Bananas, US	\$/kg	1.00	1.08	1.15	1.14	1.22	6.6
Oranges	\$/kg	0.89	0.81	0.79	0.56	0.60	7.7
Sugar, US	\$/kg	0.61	0.62	0.56	0.58	0.59	3.1
Sugar, World	\$/kg	0.40	0.35	0.28	0.28	0.28	1.1
Sugar, EU	\$/kg	0.36	0.37	0.39	0.37	0.37	1.9
Maize	\$/mt	159.16	154.53	164.41	170.07	165.47	-2.7
Sorghum	\$/mt	155.59	163.02	168.59	161.51	171.57	6.2
Wheat, US HRW	\$/mt	166.63	174.20	209.93	201.69	212.01	5.1
Phosphate Rock	\$/mt	110.46	89.69	87.90	87.96	76.05	-13.5
Potassium Chloride	\$/mt	260.33	218.23	215.50	255.50	217.79	-14.8
Urea	\$/mt	194.13	213.88	249.45	245.28	229.10	-6.6
Aluminum	\$/mt	1604.18	1967.65	2108.48	1794.49	1703.99	-5.0

bbl = barrel; kg = kilogram; mt = metric tonne

Source: The World Bank, Commodities Price Data, April 2021

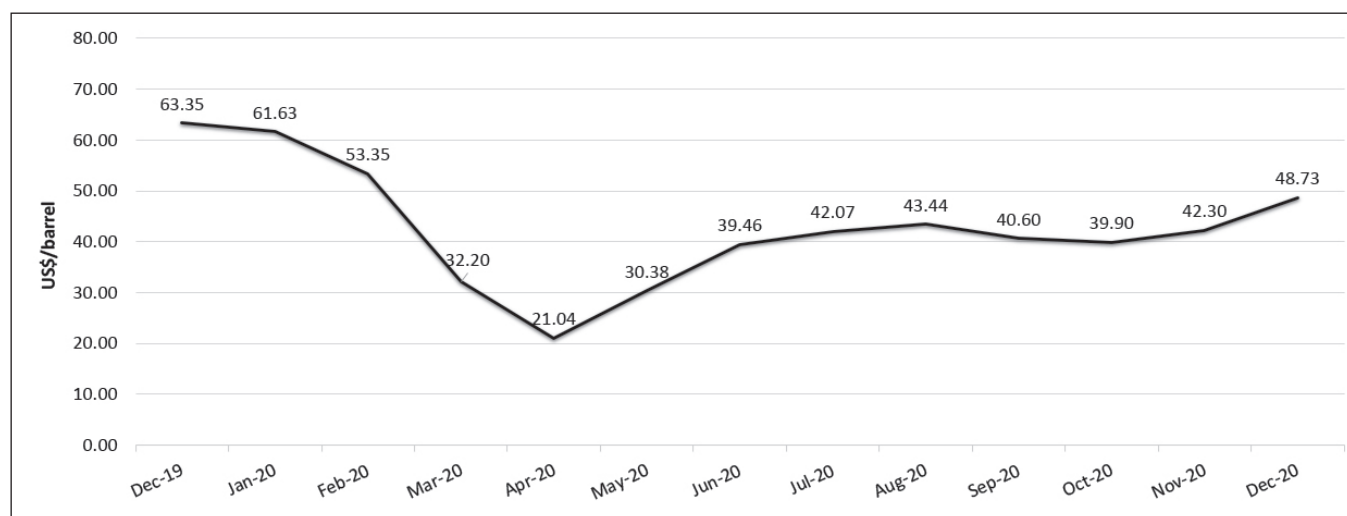


FIGURE 2A: MONTHLY AVERAGE SPOT PEAK PRICE OF CRUDE OIL, DECEMBER 2019–DECEMBER 2020

from Vietnam, the second largest producer of Robusta Coffee.

As a result of favourable growing conditions in the main producing regions of North and South America, the supply of maize increased. This resulted in a 2.7 per cent fall in prices to US\$165.47/mt. Lower yield prospects as a result of weather-related conditions, specifically drought in the Ukraine and frost in Argentina, accounted for the rise in wheat prices (US Hard Red Winter) by 5.1 per cent to average US\$212.01/mt at the end of the year. The price of sorghum rose to US\$171.57/mt from US\$161.51/mt (see Table 1.4). The increase was in part attributed to greater demand for animal feed as the pork industry recovered from the swine flu outbreak which plagued China's pig population in 2019.

In line with a lowering in the costs of key energy inputs, the prices of fertilizer commodities decreased. In addition to the reduced input cost, downward pressure was placed on the prices of fertilizers as a result of reduced use in some regions, due to lower demand in light of the global pandemic and the associated supply chain blockages. A glut of potassium chloride created further pressure on its price, causing the price to fall from US\$255.50/mt to US\$217.79/mt. The price of urea declined from US\$245.28/mt to US\$229.10/mt and the price of phosphate rock decreased from US\$87.96/ to US\$76.05/mt.

Aluminum prices were adversely impacted by the weakening global economy, resulting in a decline from US\$1 794.49/mt to US\$1 703.99/mt. Reduced demand, particularly from the auto industry, the largest consumer of aluminium, combined with excess supply in the market explained the fall in prices. Despite a subsequent recovery in the Chinese economy and the higher demand as COVID-19

restrictions were relaxed in some countries, demand was still not strong enough to push prices upwards year-over-year.

INTERNATIONAL FINANCIAL MARKETS

Global Foreign Direct Investment (FDI) inflows declined to US\$859.0 billion from US\$1.5 trillion during 2019 (Table 1.5). This 42.3 per cent fall reflected downturns in all categories of investment, namely greenfield investment projects, cross-border mergers and acquisitions, and new international project finance deals, as ongoing projects were delayed and new projects were shelved. Investment declines were recorded in the primary sector (mainly mining, quarrying and petroleum); manufacturing (reflecting disruptions to the supply chain); and services (reflecting the impact of the coronavirus on contact intensive services). The decline in inflows was concentrated in Developed Economies, down 68.6 per cent to US\$229.0 billion. FDI inflows to Europe were negative largely as a result of equity divestments and intra-company loan repayments. In North America, FDI inflows to the USA fell by 49.0 per cent due to lower multi-national enterprise investments in wholesale trade, financial services and manufacturing. In Canada, lower investments by American multi-national enterprises, accounted for a fall-off in investments to that country. However, several Developed Economies recorded increased inflows. These included Spain, Japan and Israel.

Estimated at US\$616.0 billion, FDI inflows to the Developing World declined by 12.3 per cent. Within Developing Asia, a 3.8 per cent decline to US\$476.0 billion was reported. This was driven by lower flows to West and South-East Asia, primarily due to a fall in investment to

TABLE 1.5
GLOBAL FOREIGN DIRECT INVESTMENT INFLOWS, 2016–2020
(US\$ Billion)

	2016	2017	2018	2019 ^r	2020 ^p	% Change 2020/2019
World	1 918.8	1 497.4	1 413.0	1 489	859.0	-42.3
Developed Economies	1 197.7	759.3	683.0	730.0	229.0	-68.6
European Union	556.1	340.6	357.0	305.0	344.0	12.8
North America	507.7	301.8	297.0	309.0	166.0	-46.3
Developing Economies	656.3	690.6	696.0	702.0	616.0	-12.3
Africa	46.5	41.4	47.0	46.0	38.0	-17.4
Latin America & the Caribbean	135.3	155.4	146.0	160.0	101.0	-36.9
Developing Asia	473.3	492.7	501.0	495.0	476.0	-3.8
Transition Economies	64.6	47.8	34.0	58.0	13.0	-77.6

Discrepancies due to rounding

p – preliminary

r – revised

the largest recipients in these two sub-regions, including Singapore, Malaysia, Indonesia and Vietnam. The rate of decline was, however, tempered by increased inflows to East and South Asia, resulting from a rise in inflows to Hong Kong and China. Increased inflows to Hong Kong reflected a rebound, following low inflows induced by unrests during 2019. In the case of China, FDI grew to US\$163.0 billion (14.0 per cent), facilitated by the government's investment facilitation programme which helped to stabilize investment after the early lockdown, causing the country to be the largest recipient during the year.

FDI inflows to Latin America & the Caribbean fell by 36.9 per cent to \$101.0 billion. Investments in oil-related industries, automotive industries, manufacturing and transportation were among the most affected areas. Specifically, in the Caribbean, there was an 18.0 per cent decline to US\$3.2 billion in inflows caused by reduced investment in tourism.

In Africa, FDI inflows fell by 17.4 per cent to US\$38.0 billion. In addition to the pandemic, the associated fall in commodity prices explained this out-turn. FDI inflows to Transition Economies ended the review year at US\$13.0 billion, down 77.6 per cent. The decline in inflows to Russia, the largest recipient in the region, was due to the pandemic and exacerbated by weakened oil demand and an oil-price conflict with Saudi Arabia which drove prices to record lows.

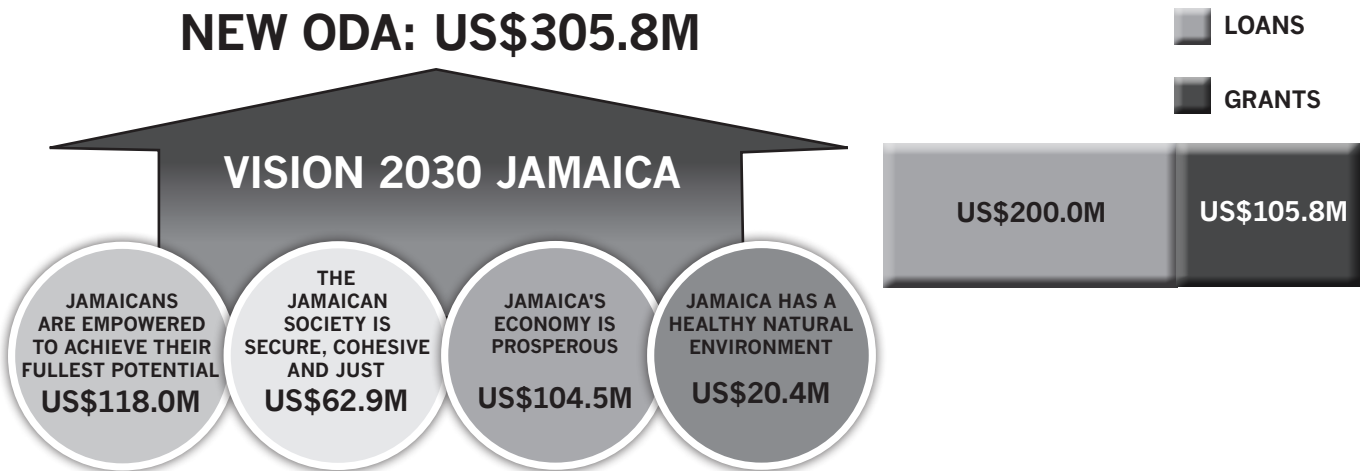
OUTLOOK

For 2021, the global economy is forecast to grow by 6.0 per cent (see Table 1.1a). This out-turn is predicated on the approval of multiple vaccines, the roll-out of vaccine programmes worldwide, and improved testing and tracing techniques. Economic activity is also expected to be supported by a relaxation of measures aimed at curtailing the spread of the virus combined with additional fiscal support policy measures implemented in some countries—notably in Japan and the USA—to spur demand.

Global trade is anticipated to improve consistent with the increase in global economic activity. Global trade volumes is forecast to grow by 8.0 per cent in 2021, with the trade in services recovering slower than trade in goods, given expectations for continued subdued travel and tourism (see Table 1.1b). Commodity prices are expected to rise as the global economy enters into its recovery phase.

Growth will be heterogenous across countries and is dependent on the severity of the spread of the disease domestically and containment measures (vaccine programmes); the extent of economic disruption (related to the dependence on contact-intensive industries); and the effectiveness of policy support implemented to limit the impact as well as engendering economic recovery. ■

OFFICIAL DEVELOPMENT ASSISTANCE



INTRODUCTION

The Government’s policies and strategies articulated in the Vision 2030 Jamaica – National Development Plan and the Medium Term Socio-Economic Policy Framework (MTF) 2018–2021 were advanced by Official Development Assistance (ODA) in the forms of loans, grants and technical assistance from multilateral and bilateral sources. New and ongoing projects funded with ODA and Government counterpart resources¹ totalled US\$2.3 billion² (\$329.5 billion),³ of which US\$2.2 billion (\$315.2 billion) was from International Development Partners (IDPs).

The provision of total ODA resources by IDPs was as follows: Multilateral Financing Institutions (MFIs)⁴, 49.4 per cent; Bilateral Partners⁵, 46.4 per cent; Multilateral Technical Cooperation (MTC) agencies, 2.0 per cent; Environment and Climate Change (EnCC) Funds, 2.0 per cent; and Multi-donor Funds⁶, 0.2 per cent (Figure 2A). Loans totalled US\$1.6 billion (\$229.2 billion) and grants amounted to

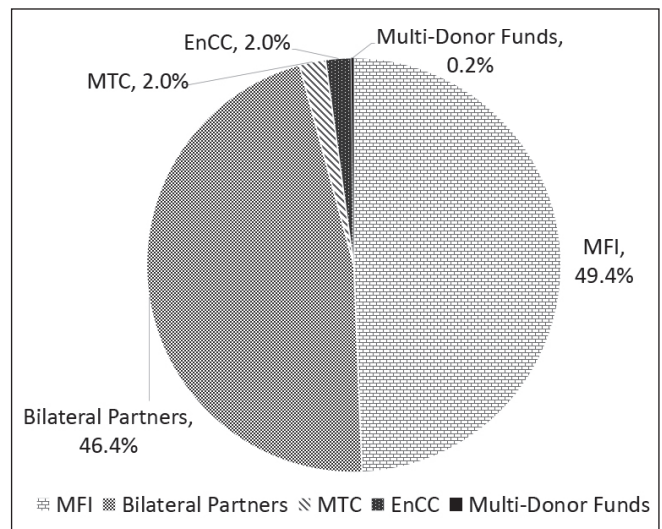


FIGURE 2A: NEW & ONGOING ODA BY SOURCE, 2020

- Counterpart resources totalled US\$145.3 (\$20.8 billion) from Government and Direct Beneficiaries.
- Amounts are rounded to one decimal place.
- The annual average exchange rate of US\$1.00:\$143.27 provided by the Bank of Jamaica is used throughout the chapter.
- These are institutions created by a group of countries that provide for national development and include the Inter-American Development Bank, Caribbean Development Bank, the World Bank and the European Union.
- These are countries that provide development assistance to other countries.
- These are multi-donor trust funds administered by the Inter-American Development Bank including the Capacity Building Initiative for Transparency Trust Fund, Compete Caribbean Partnership Facility, Multi-donor Aqua Fund, Early Childhood Development Innovation Fund, Nordic Development Fund and Multi-donor Disaster Prevention Trust Fund.

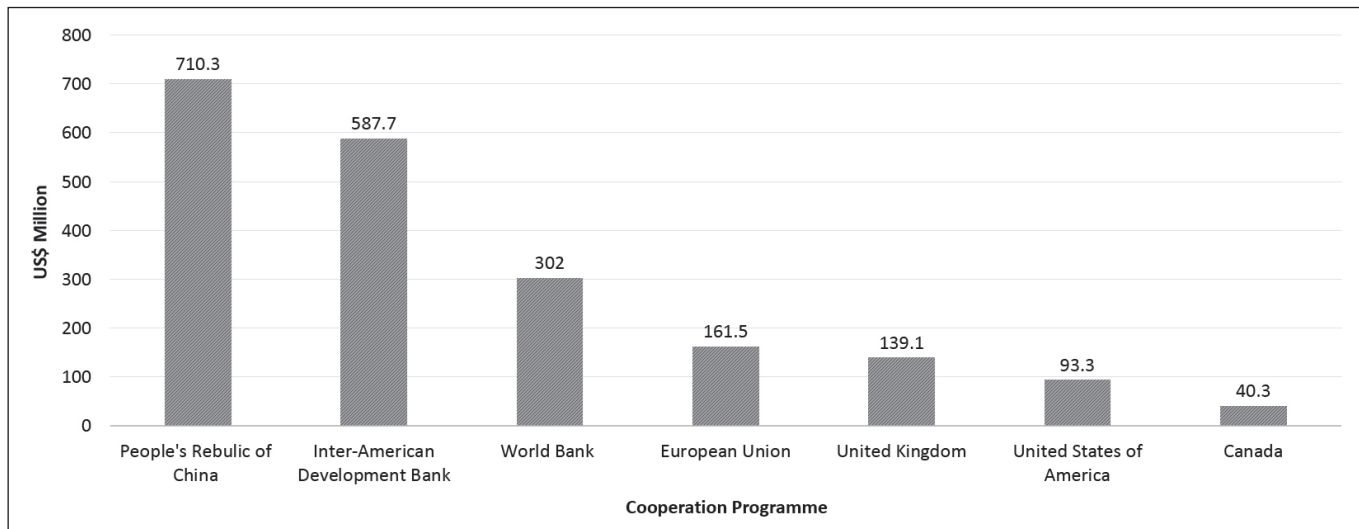


FIGURE 2B: LARGEST COOPERATION PROGRAMME BY SOURCE, 2020

US\$641.2 million (\$92.0 billion). Disbursements against the total ODA of US\$2.2 billion (\$315.2 billion) amounted to US\$353.5 million (\$50.6 billion).

The seven largest cooperation programmes accounted for US\$2.0 billion (\$286.5 billion) of total ODA, with the People's Republic of China (PRC) providing the largest amount of US\$710.3 million (\$101.8 billion) (Figure 2B).

NEW OFFICIAL DEVELOPMENT ASSISTANCE (ODA), 2020

New ODA totalled US\$305.8 million (\$43.8 billion), an increase of US\$164.9 million (\$23.6 billion) compared with the previous year (Table 2.1, Figure 2C). This increase was largely attributed to the approval of US\$192.2 million (\$27.5 billion) in budget support from the MFIs. Loan approvals

**NEW ODA
INCREASED BY
US\$164.9M**



totalled US\$200.0 million (\$28.7 billion), while new grant financing amounted to US\$105.8 million (\$15.1 billion). Of the total new grant resources, US\$18.6 million (\$2.7 billion) was utilized to support the Government's response to the COVID-19 pandemic (Box 1).

Assistance from the MFIs amounted to US\$229.5 million (\$32.9 billion), an increase of US\$144.5 million (\$20.7 billion) compared with the previous year. This increase was mainly attributed to the approval of ODA amounting to US\$222.2 million (\$31.8 billion), which included US\$30.0 million (\$4.3 billion) in investment financing from the Caribbean Development Bank (CDB)

**TABLE 2.1
SOURCES OF NEW OFFICIAL DEVELOPMENT ASSISTANCE, 2016-2020
(US\$MILLION)**

IDPs	2016			2017			2018			2019			2020		
	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total
Bilateral Partners	0	101.1	101.1	341.4	90.6	432.0	0	28.5	28.5	0	47.3	47.3	0.0	62.1	62.1
Multilateral Financing Institutions	195	31	226.0	338	11.4	349.4	130.0	36.70	166.7	65.0	20.0	85.0	200.0	29.5	229.5
Multilateral Technical Cooperation Agencies	0.0	4.3	4.3	0.0	5.7	5.7	0.0	20.4	20.4	0.0	5.8	5.8	0.0	6.3	6.3
Climate Investment Fund	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	4.9	0.0	0.0	0.0	0.0	0.0	0.0
Global Environment Fund	0.0	1.3	1.3	0.0	0.1	0.1	0.0	0.2	0.2	0.0	0.0	0.0	0.0	7.2	7.2
Multi-donor Funds										0.0	2.8	2.8	0.0	0.7	0.7
Total	195.0	137.7	332.7	679.4	107.8	787.2	130	90.7	220.7	65.0	75.9	140.9	200.0	105.8	305.8

Source: Planning Institute of Jamaica, International Development Partners and Ministry of Foreign Affairs & Foreign Trade

BOX 1:
ODA SUPPORT FOR THE COVID-19 PANDEMIC, 2020



financing from the IDB and World Bank, were provided to assist the Government as it sought to respond to the pandemic.

A total of US\$18.6 million (\$2.7 billion) in grant resources were provided for the Government's response to the COVID-19 pandemic, of which US\$17.3 million (\$2.5 billion) was new resources while US\$1.3 million (\$186.3 million) was reprogrammed funds under on-going projects. These grant resources were concentrated in the areas of Health, Governance, Social Protection, Education and Research, as well as Agriculture. In addition, loan resources to the tune of US\$170.0 million (\$24.4 billion) in budget support

The allocation of ODA resources for COVID-19 support was as follows:



Health, US\$10.0 million (\$1.4 billion) - accounted for **54.0 per cent** and was largely used for the provision of medical equipment and medicine^a, as well as to secure and assemble a field hospital^b.



Governance, US\$5.0 million (\$716.4 million), accounting for **26.0 per cent** - supported the institutional strengthening of systems for the prevention and control of COVID-19 and other critical areas such as border security, natural disaster risk protection and response, analyze the development of an Emergency Response Coordination Platform (ERCP).



Social Protection, US\$2.2 million (\$315.2 million), accounted for **12.0 per cent** - provided, among other things, nutrition and hygiene care packages as well as cash grants to the most vulnerable groups that were impacted by the pandemic. These groups included the elderly, victims of violence against women and girls, pregnant women, persons with disabilities and persons living with HIV, as well as beneficiaries of the Programme of Advancement through Health and Education (PATH).



Education and Research, US\$1.0 million (\$143.3 million), accounting for **6.0 per cent** - was used towards the procuring of tablets to support online learning, providing educational support for children with disabilities, conducting research for the use of telemedicine to digitally screen COVID-19 at-risk groups and to assess the socio-economic impact of the pandemic on households with children. Media campaigns were also utilized to raise public awareness about COVID-19 precautionary measures.



Agriculture, US\$400 000 (\$57.4 million), representing **2.0 per cent** - to strengthen Jamaica's Farmers' Acquisition Programme^c and to support the resilience of Agro-food systems to COVID-19.

a - Medical equipment included: Personal Protective Equipment, ventilators, bedside X-ray machines and monitors, X-ray protection screens, ultrasound scanners, defibrillators, thermometers, COVID-19 testing equipment, prevention testing kits, oxygen concentrators and extraction kits.

b - The USAID donated a field hospital that is able to assist with the country's response to the COVID-19 Pandemic.

c - A COVID-19 response programme being implemented by the Food and Agriculture Organization (FAO).

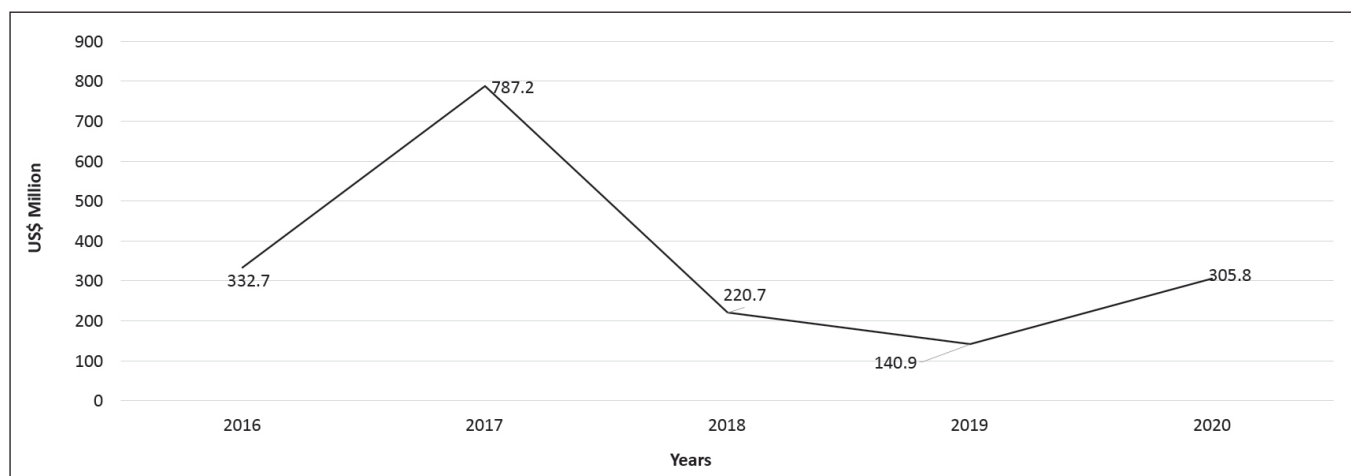


FIGURE 2C: TOTAL NEW ODA, 2016–2020

for the *Rural Water Supply loan project* and US\$192.2 million (\$27.5 billion) in budget support from the:

- Inter-American Development Bank (IDB), US\$100.0 million (\$14.3 billion) for the *Health System Strengthening Programme (HSSP) for the Prevention and Care Management of Non-Communicable Diseases Loan project*
- World Bank, US\$70.0 million (\$10.0 billion) under the *Economic Resilience Development Policy Loan project*
- European Union (EU), US\$22.2 million (\$3.2 billion) for the *Support to Citizen Security Programme in Jamaica*.

For the 3rd consecutive year, new ODA provided by bilateral partners consisted solely of grant resources. In 2020, a total of US\$62.1 million (\$8.9 billion) was approved by bilateral partners, recording an increase of 31.3 per cent compared with the previous year. This increase can be largely attributed to the approval of £17.3 million (\$3.2 billion)⁷ for the United Kingdom’s, *Serious Organized Crime and Anti-Corruption Programme*, as well as the approval of US\$15.3 million (\$2.2 billion) from the United States Agency for International Development (USAID) for the *Community Violence Prevention Activity project*.

Support from the MTC Agencies amounted to US\$6.3 million (\$902.6 million), an increase of US\$0.5 million (\$71.6 million), which was primarily due to the assistance provided by several MTC Agencies for the country’s response to the COVID-19 pandemic. Of the total new ODA provided by these agencies, the Pan American Health Organization (PAHO) provided approximately 35.0 per cent with most of these resources targeting the Government’s response to the pandemic.

TRENDS IN NEW ODA, 2016–2020

Over the 2016–2020 period, new ODA amounted to approximately, US\$1.8 billion (\$257.9 billion), with loan resources amounting to US\$1.3 billion (\$186.3 billion) and grant resources totalling US\$517.9 million (\$74.2 billion) {see Table 2.1}. New ODA approvals resulted in a sharp increase of US\$454.5 million (\$65.1 billion) between 2016 and 2017, largely attributed to the approval of the *Southern Coastal Highway Improvement Project (SCHIP)*, the *Public Sector Transformation Project*, and the second *Competitiveness and Fiscal Management Programmatic Development Policy Loan* (Figure 2D). During the period under review, new ODA trended downwards because of the maturation of the country strategies for all MFI cooperation programmes and the Government’s thrust towards economic independence. This is to be mainly achieved through fiscal consolidation and debt management which are intended to reduce the country’s borrowing.

New ODA continued to support the four goals under the Vision 2030 Jamaica – National Development Plan as outlined below (Figure 2D):

- **Goal 1: Jamaicans are Empowered to Achieve their Fullest Potential** – amounted to US\$118.0 million (\$16.9 billion), an increase of US\$80.8 million (\$11.6 billion) compared with the previous year. These resources were largely used to support the development of strategies for risk factors and the clinical management of Non-Communicable Diseases (NCDs), as well as for support in response to the COVID-19 pandemic
- **Goal 2: The Jamaican Society is Secure, Cohesive and Just** – totalled US\$62.9 million (\$9.0 billion),

7. The annual average exchange rate of £1:00:\$185.29 provided by the Bank of Jamaica was used in this section.

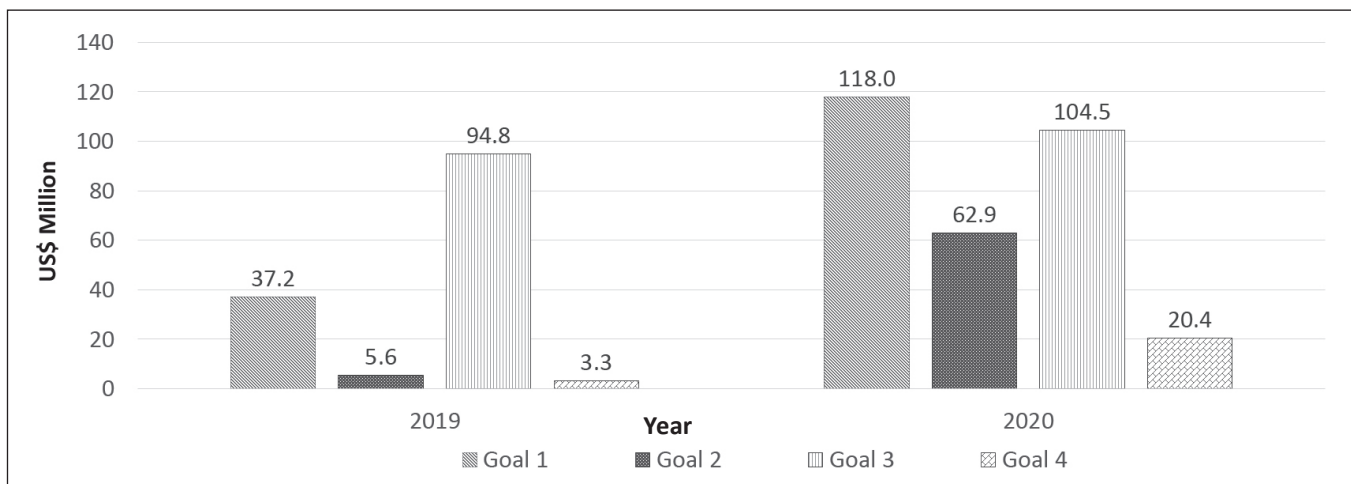


FIGURE 2D: ALIGNMENT OF NEW ODA WITH THE NATIONAL GOALS, 2020

an increase of US\$57.3 million (\$8.2 billion) over the previous year and focused primarily on citizen security and anti-crime management

- **Goal 3: Jamaica’s Economy is Prosperous**, amounting to US\$104.9 (\$15.0 billion) – an increase of US\$9.7 (\$1.4 billion) compared with the previous year, with most of these resources supporting the World Bank’s Economic Resilience Development Policy Loan project, US\$70.0 million (\$10.0 billion) and the CDB’s Rural Water Supply loan project, US\$30.0 million (\$4.3 billion).
- **Goal 4: Jamaica has a Healthy Natural Environment**, totalling US\$20.4 million (\$291.1 million) – an increase of US\$17.1 (\$2.5 billion) over the previous

year. These resources were mainly used to augment the Global Environment Fund’s *Conserving Biodiversity and Reducing Land Degradation using an Integrated Approach*⁸ project, amounting to US\$6.3 million (\$902.6 million) and the EU’s, *A Jamaican Path from Hills to Ocean (H20)* project, totalling €4.9 million (\$780.7 million).⁹

SECTOR ALLOCATION OF NEW ODA

The sectoral allocation of new ODA (Figure 2E) was as follows:

- Administrative which included Public Sector Reform, Justice, Budget Support and Governance, US\$217.4

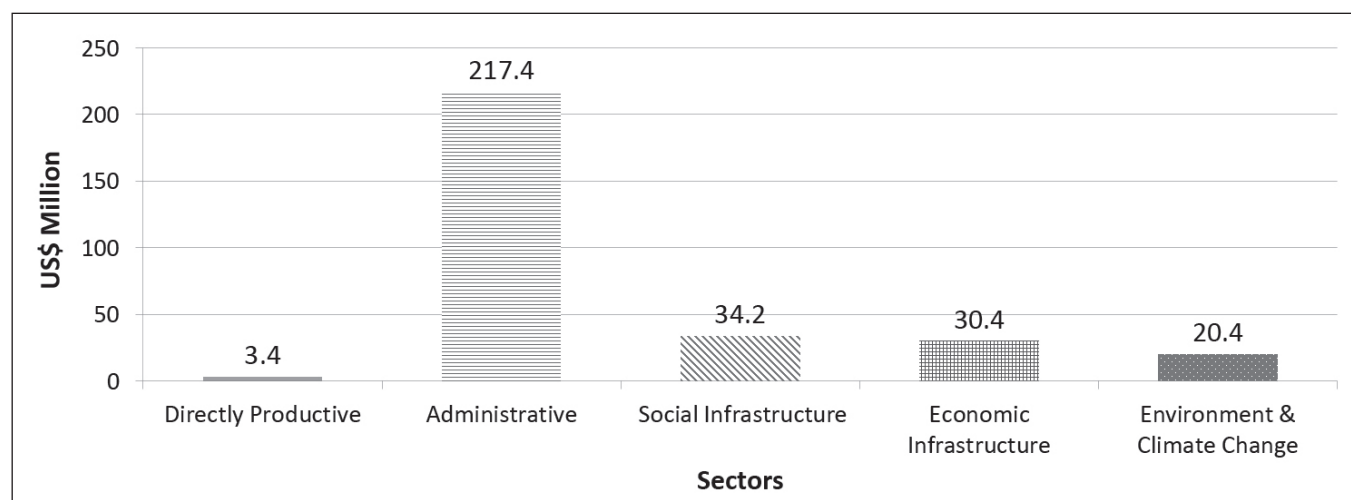


FIGURE 2E: SECTORAL ALLOCATION OF NEW ODA, 2020

8. This project is administered by the United Nations Development Programme (UNDP)

9. EU’s Average Annual Exchange Rate is \$159.32:€1.00

TABLE 2.2
SUMMARY OF 2020 OFFICIAL DEVELOPMENT ASSISTANCE (US\$ MILLION)

International Development Partners	New ODA			Sectors for New ODA					Disbursements (New & On-going ODA)		
	Loan	Grant	Total	Directly Productive	Administrative	Social Infrastructure	Economic Infrastructure	Environment & Climate Change	Loan	Grant	Total
MFI											
CDB	30.00	0.20	30.20			0.20	30.00			1.6	1.6
EU		27.7	27.70		22.20	0.10		5.40		28.0	28.0
IDB	100.0	1.6	101.6	0.6	100.0	0.2	0.4	0.4	126.4	1.5	127.9
World Bank	70.0	0.0	70.0		70.0				91.0		91.0
Sub-Total	200.0	29.5	229.5	0.6	192.2	0.4	30.4	5.8	217.4	31.1	248.5
BILATERAL											
Australia		0.0	0.0			0.0				0.0	0.0
Canada		6.2	6.2		1.0	1.6		3.6		6.9	6.9
People's Republic of China		0.4	0.4			0.4			51.0	0.4	51.4
Cuba		0.4	0.4			0.4				0.4	0.4
India		0.1	0.1			0.1				0.1	0.1
Japan		3.2	3.2			2.4		0.8	0.0	6.7	6.7
South Korea		1.3	1.3		0.8	0.5				1.3	1.3
Morocco		1.8	1.8	1.8						0.0	0.0
Russia		0.1	0.1			0.1				0.1	0.1
Serbia		0.0	0.0			0.0				0.0	0.0
United Kingdom		26.6	26.6		22.3	1.8		2.5		10.2	10.2
United States of America		22.0	22.0		1.0	21.0				10.7	10.7
Sub-Total	0.0	62.1	62.1	1.8	25.1	28.4	0.0	6.8	51.0	36.8	87.8
MTC											
UNAIDS		0.3	0.3			0.3				0.3	0.3
FAO		0.7	0.7	0.7						0.6	0.6
GEF SGP		0.2	0.2					0.2		0.4	0.4
Global Fund		0.8	0.8			0.8				5.0	5.0
IAEA		0.0	0.0							0.2	0.2
OAS		0.1	0.1			0.1				0.0	0.0
PAHO		2.2	2.2			2.2				2.1	2.1
IOM		0.3	0.3		0.0	0.3				0.2	0.2
UNDP		0.7	0.7			0.7				0.3	0.3
UNEP		0.0	0.0							0.2	0.2
UNESCO		0.1	0.1			0.1				0.1	0.1
UNICEF		0.8	0.8			0.8				1.3	1.3
UNFPA		0.2	0.2			0.2				0.2	0.2
Commonwealth Secretariat		0.0	0.0							0.1	0.1
UN Women		0.0	0.0							0.1	0.1
Sub-Total	0.0	6.3	6.3	0.7	0.0	5.4	0.0	0.2	0.0	11.1	11.1
ENVIRONMENT & CLIMATE CHANGE FUNDS											
Climate Investment Funds		0.0	0.0							4.4	4.4
GEF ^a		7.2	7.2					7.2		1.1	1.1
Sub-Total	0.0	7.2	7.2					7.2		5.5	5.5
MULTI-DONOR FUNDS^b		0.7	0.7	0.3				0.4		0.6	0.6
Sub-Total	0.0	0.7	0.7	0.3	0.0	0.0	0.0	0.4	0.0	0.6	0.6
TOTAL	200.0	105.8	305.8	3.4	217.4	34.2	30.4	20.4	268.4	85.1	353.5

a – This reflects funds being administered by IDB and UNDP

b – These are multi-donor trust funds administered by the IDB

Source: Planning Institute of Jamaica and International Development Partners

million (\$31.1 million)

- Directly Productive which included Agriculture, Tourism, Mining and MSME, US\$3.4 million (\$487.1 million)
- Economic Infrastructure which included Transport, Power, Water and Sewerage, US\$30.4 million (\$4.4 billion)
- Environment and Climate Change which included Natural Hazards, Ecosystem Preservation, Disaster Risk Reduction and Climate Change Resilience, US\$20.4 million (\$2.9 million)
- Social Infrastructure which included Health, Education, Housing and Social Safety Net, US\$34.2 million (\$4.9 billion).

TOTAL DISBURSEMENTS

**DISBURSEMENTS
INCREASED BY 29.3%**



Disbursements of loans and grants for new and ongoing projects totalled US\$353.5 million (\$50.6 billion), an increase of 29.3 per cent compared with 2019 (Table 2.2). The increase was largely

as a result of the disbursement of US\$173.3 million (\$24.8 billion) in budget support financing. Loan disbursements amounted to US\$268.4 million (\$38.5 billion) while grant resources totalled US\$85.1 million (\$12.2 billion) {Figure 2F}. Disbursements were as follows:

- MFIs, US\$217.4 million (\$31.1 billion) in loans and US\$31.1 million (\$4.5 billion) in grants
- Bilateral Partners, US\$51.0 million (\$7.3 billion) in loans and US\$36.8 million (\$5.3 billion) in grants
- MTCs, grants of US\$11.1 million (\$1.6 billion)
- Environment and Climate Change (EnCC) Funds, grants of US\$5.5 million (\$788.0 million)
- Multi-donor Funds, grants of US\$0.6 million (\$86.0 million).

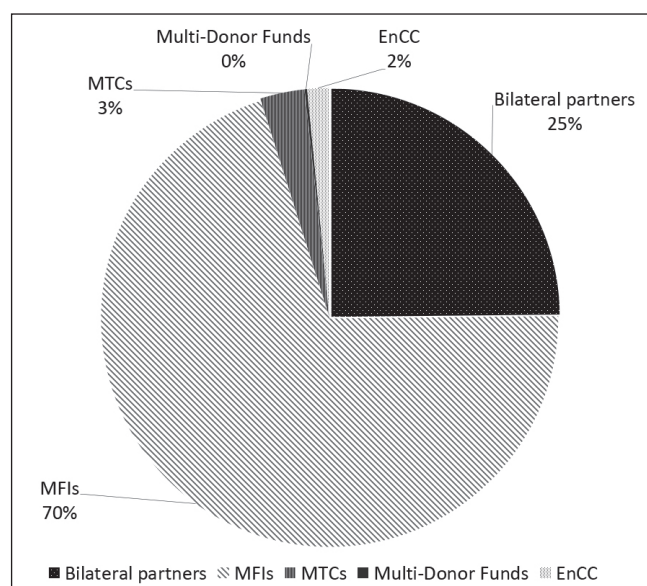


FIGURE 2F: DISBURSMENTS BY INTERNATIONAL DEVELOPMENT PARTNERS, 2020

While there was an increase in overall disbursements, investment loans recorded a decrease of US\$98.0 million (\$14.0 billion)¹⁰ compared with the previous year. This reduction was largely attributed to delays across cooperation programmes due to, among other things, implementation challenges associated with the COVID-19 pandemic, such as the reduction of fiscal space which was normally made available for the execution of activities under investment projects. Conversely, disbursement in grant resources recorded an increase of US\$4.9 million (\$702.0 billion) over the previous year. This increase was primarily due to the support provided by multilateral and bilateral partners in response to the COVID-19 pandemic.

**TABLE 2.3
NET FLOWS, 2020 (US\$ MILLION)**

	IDB ^a	CDB	IBRD	SUB TOTAL	PRC	TOTAL
Loan Disbursements	123.56	0.00	92.10	215.66	51.01	266.68
DEBT SERVICING:	142.25	33.14	52.71	228.10	96.25	324.35
Repayments (Principal)	102.61	25.49	32.37	160.47	77.44	237.91
Interest and Charges	39.64	7.65	20.34	67.63	18.81	86.44
Net Flow	-18.69	-33.14	39.39	-12.44	-45.23	-57.67

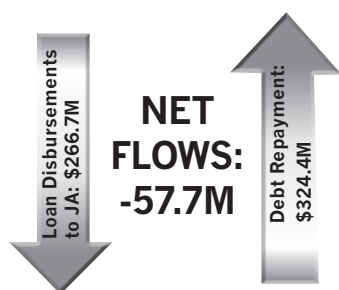
a – The Netflow Information under the IDB Portfolio includes PRC's financial support to the Public Sector Efficiency Programme and the Adaption Programme and Financing Mechanism for Pilot Programme for Climate Resilience (PPCR) Jamaica

Source: Ministry of Finance and the Public Service

10. Disbursements against investment loans amounted to US\$193.1 million (\$27.7 billion) and US\$95.1 million (\$13.6 billion), in 2019 and 2020, respectively.

NET FLOWS¹¹

The GOJ, for the 4th consecutive year, maintained a negative net flow position. Loan disbursements from the multilateral lending partners (IDB and World Bank) and the People's Republic of China (PRC) amounted to US\$266.7 million (\$38.2 billion), representing an increase of US\$89.4 million (\$12.8 billion) {Table 2.3}. Principal repayments to multilateral lending partners also recorded an increase of 12.4 per cent compared with the previous year. The repayment of principal and the payment of interest and other charges totalled US\$334.4 million (\$46.5 billion) a decrease of 0.2 per cent.



MULTILATERAL FINANCING

Caribbean Development Bank (CDB)

The cooperation programme with the CDB comprised seven projects with total financing of US\$39.3 million (\$5.6 billion), an increase of US\$30.0 million (\$4.3 billion). The approval of a US\$30.0 million loan to finance the upgrade of rural water infrastructure, resulted in the increased financing to Jamaica. The Government's counterpart financing was US\$7.4 million (\$1.1 billion). Disbursements against the portfolio were US\$1.6 million (\$229.2 million) compared with US\$2.2 million (\$315.2 million) in the previous year. This decrease was due to delays in project implementation within the portfolio.

Additionally, a total of US\$70.7 million (\$10.1 billion)

in grant financing for seven projects, aimed at building infrastructural resilience to climate change and promoting agricultural development, was administered by the CDB, on behalf of other development partners. The CDB's financing supported the following sectors: Administrative, US\$0.5 million (\$71.6 million); Economic Infrastructure, US\$30.6 million (\$4.4 billion); and Social Infrastructure, US\$8.1 million (\$1.1 billion) {Figure 2G}.

Financing of US\$30.2 million (\$4.3 billion) was approved for the following projects:

- The *Rural Water Supply Project*, with loan financing of US\$30.0 million (\$4.3 million): support the Government's upgrading and construction of infrastructure to improve the provision of potable water to seven major rural towns¹² and districts across the Island. Capital works include rehabilitation and/or extension of six existing NWC rural water supply systems and construction of one new system from Green Park to Bamboo in St Ann. Works will include: rehabilitation of water storage tanks and water treatment plants; upgrading of the distribution network; and the integration of renewable energy and energy efficiency solutions.
- The Multidimensional Poverty Index (MPI) for Jamaica, with grant financing of US\$229 000 (\$32.8 million): support the development of a non-income measure of poverty to complement the income based measurement of poverty. The MPI will take into account a number of other contributing factors to poverty in the Jamaican context.

European Union (EU)

The European Union (EU) provided €145.6 million (\$23.2 billion),¹³ an increase of €13.0 million (\$2.1 billion) in

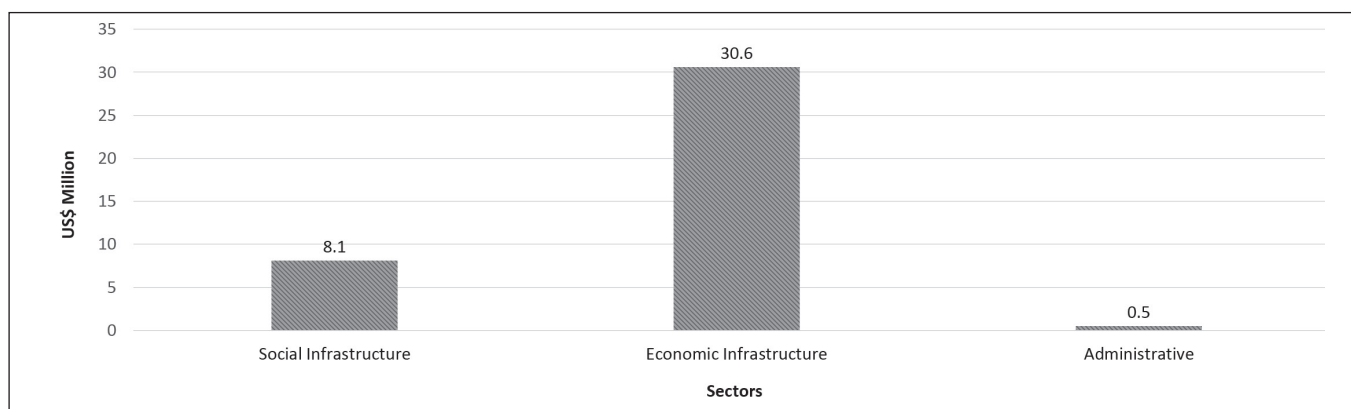


FIGURE 2G SECTORAL ALLOCATION FOR THE CDB PORTFOLIO, 2020

11. Net Flow equals Total Loan Disbursements less Total Repayments

12. The seven towns are Jordan Run to Agualta Vale, St Mary; Albert Town, Trelawny; Green Park to Bamboo, St Ann; Kemps Hill, Clarendon; Mason Hall, St Mary; Port Morant to Airy Castle, St Thomas; and Union to Balaclava, St Elizabeth

13. Average Annual Exchange Rate is \$159.32:€1.00

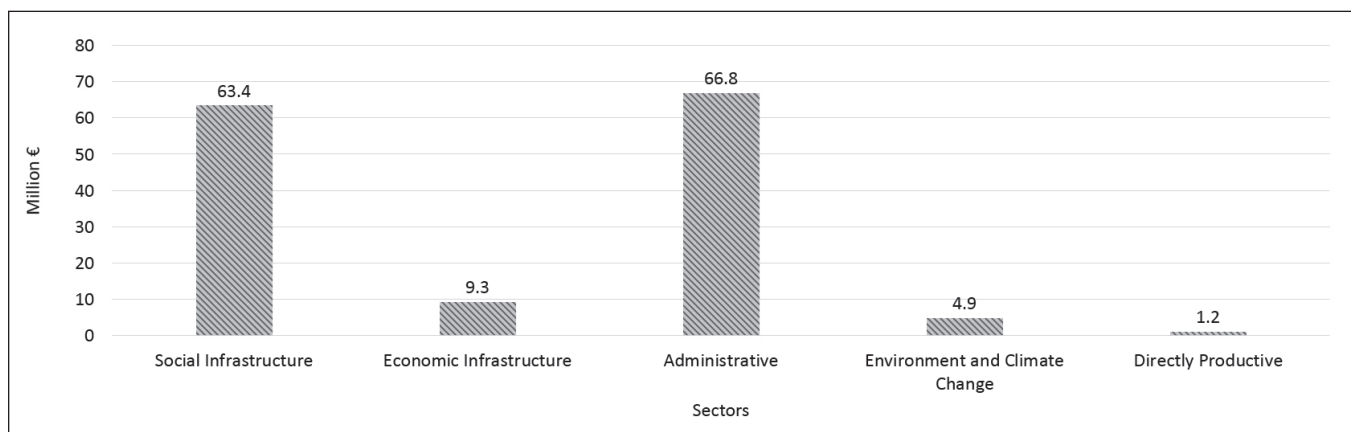


FIGURE 2H SECTORAL ALLOCATION FOR THE EU COOPERATION PROGRAMME, 2020

grant resources in support of 17 programmes and projects. This increase can be attributed to the commencement of two new programmes totalling €24.9 million (\$4.0 billion). The EU also provided support to Non-State Actors from the European Instrument for Democracy and Human Rights and other financing sources.

The sectors to which these grant resources were allocated are Administrative, €66.8 million (\$10.6 billion); Directly Productive, €1.2 million (\$187.9 million); Environment and Climate Change, €4.9 million (\$780.7 million); Economic Infrastructure, €9.3 million (\$1.5 billion); and Social Infrastructure, €63.4 million (\$10.1 billion) {Figure 2H}.

Disbursements totalled €25.2 million (\$4.0 billion) representing an increase of 68.0 per cent compared with disbursements for 2019. This increase in disbursements was the result of the success of the GOJ in meeting the agreed targets under three budget support programmes, namely, the *Jamaica Justice Sector Reform Programme*, the *Public Financial Management Reform Programme* and the programme for *Improved Forest Management in Jamaica*. The increase was also attributed to disbursements made under the *Programme for the Reduction of Maternal and Child Mortality* (PROMAC) upon the completion of civil works at the targeted hospitals.

The EU, in support of the Government's response to the COVID-19 pandemic, approved the reallocation of €350 000 (\$55.8 million) under the Support to Public Finance Management budget support programme. The EU also agreed to the emergency use of 29 ventilators acquired under PROMAC and a reprogramming of a further €0.7 million (\$111.5 million) of unutilized funds from this project to purchase additional ventilators and laboratory equipment.

The following three grants were signed:

- *Support to Citizen Security in Jamaica*, €20.0 million (\$3.2 billion): to contribute to the overall improvement of the security environment in Jamaica, by reducing

social vulnerability to violence and crime against children, youth and women in some of the country's most at risk communities, while at the same time ensuring greater social inclusion of these vulnerable groups in the society

- *A Jamaican Path from Hills to Ocean* (H2O), €4.9 million (\$780.7 million): to increase Jamaica's resilience to climate change and reduce poverty by protecting livelihoods, particularly through the implementation of Integrated and Sustainable Landscape Management in three selected Watershed Management Units (WMUs). The targeted WMUs are the Wagwater including Castleton Gardens (St Mary), the Rio Nuevo (St Mary) and the Rio Bueno and White River (St Ann and Trelawny). The H2O project will also be implemented in wetland ecosystems in Falmouth (Trelawny) and the Mason River Protected Area (Clarendon and St Ann), as well as sea grass beds in Ocho Rios (St Ann) and the Hellshire Bay and Half Moon Bay – Portland Bight Protected Area (St Catherine and Clarendon). The Government is expected to provide counterpart resources in the amount of €1.1 million (\$175.3 million).
- *EU ACP Strengthening Health Systems for NCDs*, US\$55 000 (\$7.9 million): to build the capacity of the Ministry of Health and Wellness to perform essential public health functions.

The *Upgraded Flood Early Warning System Rio Cobre Watershed project* (2017–2020) for US\$ 218 751 (\$31.3 million) ended. The objectives of the project were to increase the monitoring equipment density by procuring four new stream gauging stations and six new rainfall intensity stations; to recalibrate the flood discharge rate of the Watershed Management Unit, which is critical to improve the flood management system of the Rio Cobre; retrofit all stream gauging stations and rainfall intensity stations within the project area; and install solar-powered back-up system/servers.

Inter-American Development Bank (IDB)

The cooperation programme with the Inter-American Development Bank totalled US\$587.8 million (\$84.2 billion) – comprising loan financing of US\$576.3 million (\$82.6 billion) for 13 projects; grants totalling US\$5.5 million (\$788.0 million) for 20 projects; and an amount of US\$6.0 million (\$859.6 million) from its Multilateral Investment Fund for nine projects to the private sector. The Government’s counterpart financing totalled US\$12.3 million (\$1.8 billion). The IDB’s total financing decreased by US\$9.7 million (\$1.4 billion) as no new loans were approved.

The Bank also administered¹⁴ US\$104.9 million (\$15.0 billion) for 15 projects on behalf of the EU, Global Environment Fund (GEF), Climate Investment Fund (CIF) and bilateral partners, as well as eight projects totalling US\$4.0 million (\$573.1 million) from Multi-Donor Trust Funds.

Loan resources financed the following sectors: Administrative, US\$228.3 million (\$32.7 billion); Directly Productive, US\$25.0 million (\$3.6 billion); Economic Infrastructure, US\$168.0 million (\$24.1 billion); and Social Infrastructure, US\$155.0 million (\$22.2 billion)(Figure 2I).

The sectoral allocation for grants were Administrative, US\$1.8 million (\$257.9 million); Directly Productive, US\$3.6 million (\$515.8 million); Economic Infrastructure, US\$1.7 million (\$243.6 million); Environment and Climate Change, US\$2.7 million (\$386.8 million); and Social Infrastructure, US\$1.7 million (\$243.6 million) {Figure 2I}.

Loan disbursements totalled US\$126.4 million (\$18.1 billion) an increase of US\$28.3 million (\$4.1 million) that was attributed to the approval and full disbursement of US\$100.0 million (\$14.3 billion) in Budget Support financing for the *Support for the Health System Strengthening Programme for the Prevention and Care Management of Non-Communicable Diseases Programme (II)* and assistance in the GOJ’s COVID-19 response and recovery.

Grant disbursements totalled US\$1.5 million (\$216.3 million), a decrease of US\$1.3 million (\$186.3 million) compared with 2019. This was attributed to the completion of 11 projects, as well as the negative effects of the COVID-19 pandemic, which resulted in the slow implementation of several grant projects.

The second hybrid¹⁵ Programmatic Policy-Based Loan (PPBL) with financing of US\$100.0 million (\$14.3 billion) was approved and fully disbursed. This augmented the ongoing *Support for the Health System Strengthening Programme for the Prevention and Care Management of Non-Communicable Diseases investment loan project*, totalling US\$50.0 million (\$7.1 billion). The support proved useful as the Government sought to respond to the COVID-19 pandemic. The second operation will continue to support the implementation of coherent and comprehensive strategies to address Non-Communicable Diseases (NCD) risk factors and the clinical management of NCDs by the Ministry of Health and Wellness (MOHW).

The following two projects financed with loan resources

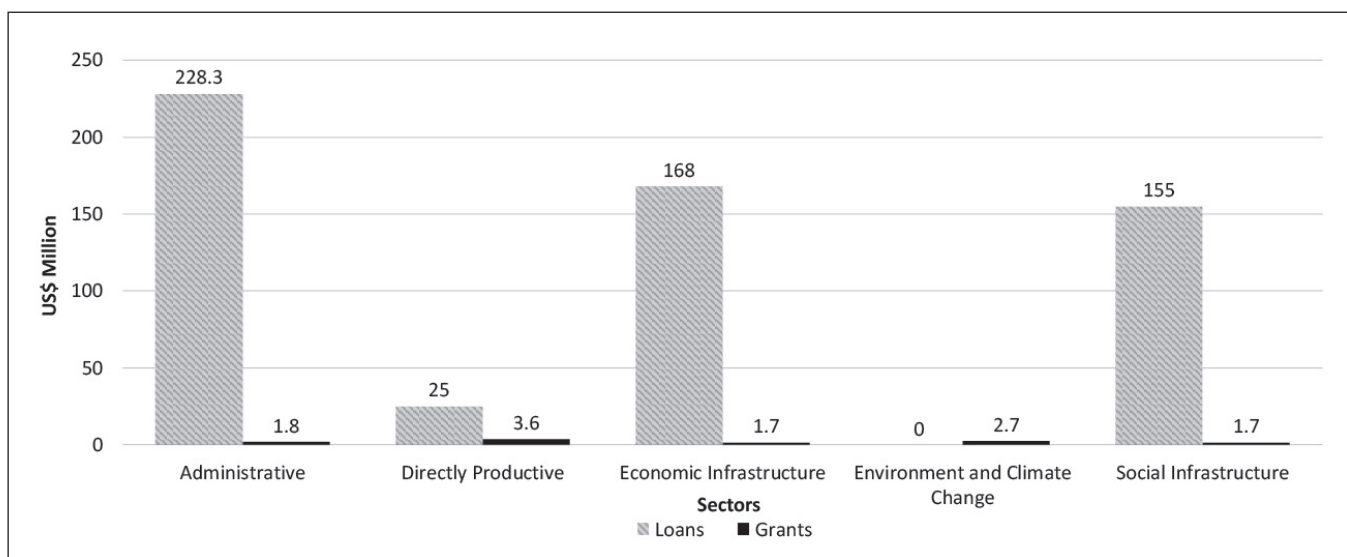


FIGURE 2I: SECTORAL ALLOCATION OF THE IDB COOPERATION PROGRAMME, 2020

14. Bank Administered projects are defined as loan or grant projects executed by the IDB on behalf of other International Development Partners.

15. A hybrid model loan features an investment loan and a programmatic policy-based loan (PPBL).

ended:

- *Public Sector Efficiency Programme (PSEP)* (2013–2020), US\$10.3 million (\$1.5 billion), was co-financed by the People’s Republic of China with loan resources of US\$8.1 million (\$1.2 billion) and grant funds from the EU in the sum of US\$6.6 million (\$945.6 billion). Among the achievements of PSEP were the:
 - implementation of the Human Capital Management System (MyHR+) in 14 Ministries, Departments and Agencies (MDAs) that facilitated, *inter alia*, the digitization of HR records to allow for online access by employees to their payroll and HR data
 - training of 333 HR Professionals in various learning interventions, specifically Performance Coaching, Organisational Development, Strategic Human Resource Management and Research and Quantitative Analysis
 - development and completion of the ICT Policies, ICT Handbook, Norms and Standards with 22 policies, standards and guidelines for the ICT Authority
 - completion of the design of GovNet¹⁶ which is being used to improve the connectivity of the MDAs using high speed Fibre Links
 - completion of the business process re-engineering for the Government Electrical Inspectorate (GEI)
 - completion and launch of the On-line Business Registration process and placement of five kiosks—two at the St James Revenue Centre, one at the Jamaica Business Development Centre in Montego Bay, one at the Constant Spring Revenue Centre, and another at the Companies Office of Jamaica.
- *Citizen Security and Justice Programme III* (2014–2020), US\$20.0 million (\$2.9 billion), was co-funded with grant resources from the Foreign, Commonwealth and Development Office (FCDO)¹⁷, US\$16.7 million (\$2.4 billion) and Global Affairs Canada (GAC), US\$16.0 million (\$2.3 billion). The programme facilitated, *inter alia*:
 - training of 2 599 students (1 549 Males)
 - who were suspended from school and demonstrated maladaptive behaviour in Violence Prevention and Conflict Resolution
 - the participation of 1 420 unattached at-risk-youth and community residents in peacebuilding and community cohesion activities through the Crime Prevention by the Goals 4 Life, Sports Campaign
 - increased community safety through the installation of two lighting arrestors in Homestead and March Pen, St Catherine as well as the removal of zinc fences in Windsor Heights, St Ann; Effortville, May Pen; and Alwyn Ashley, Kingston
 - development of 15 Community Profiles and 25 Safety Plans
 - the placement of 2 341 Secondary and Tertiary students in the Summer Diversion/Employment Programme, where young persons were prepared for the labour market and received training to reduce anti-social behaviour
 - the development of a Transitional Framework to guide the transfer of the activities and models to the Ministry of National Security (MNS) and other relevant MDAs
 - the development of a risk assessment tool that identified 3 559 high to medium risk youth who benefited from crime prevention interventions
 - the development of a case management system to allow social workers to work with medium to high-risk youth. A total of 18 Case Management Officers were engaged to conduct assessments and case management services
 - a Women’s Health Survey on Intimate Partner Violence (2016) conducted for women between the age of 15 and 64 years
 - the delivery of violence interruption services including detection, mediation of potential conflicts, identification and treatment of high-risk individuals, as well as implementation of behaviour change community initiatives to 48 high-violence communities (see chapter on National Security and Justice).

16. GovNet is defined to be a secure, wide area network communication infrastructure that will connect government ministries, agencies and departments to facilitate shared services, including data centre computing services (Gov-Cloud), consolidated voice communication system (Gov-Talk), consolidated email system (Gov-Email) and Gov-Internet. This information was retrieved from <https://jis.gov.jm/govnet-design-completed/>

17. In September 2020, the United Kingdom’s Foreign Commonwealth Office merged with the Department for International Development (DFID) creating the Foreign, Commonwealth and Development Office.

TABLE 2.4
NEWLY APPROVED IDB GRANT PROJECTS, 2020

PROJECT NAME	OBJECTIVE	PROJECT AMOUNT
Modernizing Jamaica's Transport Sector to Improve Sustainability, Safety and Efficiency	To support the Ministry of Transport and Mining (MTM) to collect and analyze data on travel patterns and to build the enabling environment to implement technology-enabled traffic enforcement measures which will improve the sustainability, safety, and efficiency of land transportation in Jamaica.	US\$200 000 (\$28.7 million)
Supporting the Recovery of the Energy Sector in Jamaica from the COVID-19 Pandemic	To support the recovery of Jamaica's energy sector from the effects of the COVID-19 pandemic, by addressing the financial strains on the electricity sector, supporting the modernization and security of operational systems and augmenting interventions for vulnerable communities.	US\$200 000 (\$28.7 million)
Catalyzing Social Transformation through the Arts, Creativity and Technology	To develop a business model that creates opportunities to leverage immersive digital technologies that will increase market access, build capacity and use participatory methodologies to add economic and social value for creative entrepreneurs.	US\$0.6 million (\$85.9 million)
Building Resilience through Climate Adaptation Technologies	To use technology to improve climate, weather data and other hazard-related information and to share it effectively. This will result in the prevention of a loss of life, damage to property and revenue losses as a result of severe weather and climate events.	US\$420 000 (\$60.2 million)
TeleHealth and Consultation in Jamaica	To design and test a scalable model for telemedicine to digitally screen COVID-19 at-risk groups such as those with pre-existing conditions and the elderly.	US\$150 000 (\$21.5 million)
TOTAL		US\$1.6 million (\$229.2 million)

Source: Compiled by the Planning Institute of Jamaica based on data provided by the IDB

The following grant projects were approved (Table 2.4):-

- One new multi-donor funded project, with financing of US\$300 000 (\$42.9 million) for *Building a New Shared Brand for the Jamaica Sauces & Spices Cluster project*. The grant resources is aimed at enhancing the competitiveness of new Jamaican sauces and spices products in the USS market, which will contribute to an increase in exports and employment of the agro-processors involved, as well as to generate value for local farmers in the supply chain.

The following seven grant-financed projects ended:

- *Integrated Management of the Yallahs-Hope Watershed Management Area project* (2014–2020), US\$3.9 million (\$558.8 billion). Achievements under the project included, *inter alia*:
 - design of Jamaica's first Payment for Ecosystem Services (PES) Scheme¹⁸, branded as Ecosystem Services Incentive Programme (Eco-SIP)
 - reforestation of 565 hectares of degraded lands in the project area
 - development of the GIS-based decision support system (DSS) in the project area, which allowed

for data sharing across the relevant Government agencies

- updating of Jamaica's Watershed Policy.
- *Breaking Ground: Jamaica First Payments for Ecosystem Services Scheme project* (2017–2020), US\$300 000 (\$42.9 million), provided additional financing to further the design of Jamaica's first PES Scheme under the *Integrated Management of the Yallahs-Hope Watershed Management Area project*.
- *Support to Energy Management and Efficiency Program* (2017–2020), US\$340 000 (\$48.7 million) augmented the implementation of the loan operation, *Energy Management and Efficiency Program (EMEP)* by strengthening the expertise of the Project Executing Unit (PEU) and reviewing the lighting specifications for retrofitting selected government buildings, among other things.
- *Institutional Support and Capacity Building for the Petroleum Corporation of Jamaica project* (2017–2020), US\$207 734 (\$29.8 million) strengthened the capacity of the PEU for the smooth execution of the EMEP loan operation, which was transferred to the Ministry of Science, Energy and Technology.

18. A Payment for Ecosystem Service Scheme is a programme that provides incentives to farmers or landowners in exchange for sustainably managing their lands, resulting in the conservation of natural resources in the marketplace.

- *Strengthening of Active Labour Market Policies in Jamaica project* (2016–2020), US\$250 000 (\$35.8 million), strengthened the capacities of National Apprenticeship Programme (NAP) and the Labour Market Information System (LMIS), which supported the work of MDAs such as the Heart Trust/NTA, the Ministry of Education, Youth and Information (MoEYI) and Ministry of Labour and Social Security (MLSS), among others.
- *Pricing, Targeting, and Effectiveness of Business-training Activities, Experimental Evidence from Jamaica project* (2017–2020), US\$90 000 (\$12.9 million), assessed the willingness of 852 entrepreneurs to pay for business training to determine if and when it is possible to charge a positive price for business training for micro, small and medium enterprises.
- *Development of Jamaica's Digital Government Agenda Project* (2018–2020), US\$300 000 (\$42.9 million) provided technical assistance to support the implementation of three IDB loan operations: *Public Sector Transformation, Security Strengthening, and Implementation of the National Identification System (NIDS) for Economic Growth*.

International Bank for Reconstruction and Development (IBRD) – The World Bank

The cooperation programme with the World Bank consisted of eight loan funded projects with total financing of US\$302.0 million (\$43.3 billion). The Bank also administered grant financing of US\$14.3 million (\$2.0 billion) for eight Trust Fund financed projects of which two, with funding of US\$11.7 million (\$1.7 billion), are being executed by the Government.

The sectors financed with loan resources were Administrative, US\$105.0 million (\$15.0 billion); Directly Productive, US\$105.0 million (\$15.0 billion); Environment and Climate Change, US\$30.0 million (\$4.3 billion) and Social Infrastructure, US\$62.0 million (\$8.9 billion).

Loan disbursements totalled US\$91.0 million (\$12.9 billion), an increase of US\$46.1 million (\$6.6 billion) compared with 2019. The approval and full disbursement of the *Economic Resilience Development Policy Loan* with financing of US\$70.0 million (US\$10.2 billion) contributed to the increase. This Development Policy Loan, US\$70.0 million (\$10.2 billion), provided budget support financing for the Government's ongoing fiscal sustainability and financial resilience against natural disaster risks. The financing also

supported activities aimed at improving the investment climate for sustainable growth.

BILATERAL COOPERATION¹⁹

The Government of **Australia**, under the Direct Aid Programme, approved grant resources of US\$24 132 (\$3.5 million) to train women from underserved communities in Heartsaver First Aid techniques, to efficiently respond and manage in the event of a medical emergency.

The cooperation programme with the Government of **Canada**, through the Global Affairs Canada, amounted to C\$52.9 million (\$5.8 billion)²⁰ for 15²¹ bilateral grant initiatives. Sectoral allocation was as follows: Administrative, C\$21.4 million (\$2.3 billion); Environment and Climate Change, C\$9.4 million (\$1.0 billion); and Social Infrastructure, C\$22.1 million (\$2.4 billion). Disbursements totalled C\$9.0 million (\$982.3 million) representing a 16.9 per cent increase from the previous year. This can be attributed to the approval and full disbursements of funding in response to the COVID-19 pandemic. The portfolio was supported by GOJ counterpart resources of C\$376 415 (\$41.1 million).

The following grants were approved:

- Allocation of C\$1.3 million (\$141.9 million) to Jamaica under the *Enabling Gender-Responsive Disaster Recovery, Climate and Environmental Resilience in the Caribbean (EnGenDER) Project*. Assistance intends to improve climate and disaster resilience for women, girls, and other key vulnerable groups²² as well as strengthen institutional capacities to deliver services effectively to accelerate post-disaster recovery and mitigate risks. As part of the project's COVID-19 response plan, funding of C\$186 000 (\$20.3 million) was disbursed to provide income support to persons who lost wages and deliver 1 200 nutrition and hygiene packages to impacted households, including the elderly, the disabled, and women affected by gender-based violence. The project is being administered by the United Nations Development Programme and UN Women.
- Funding of C\$363 500 (\$39.7 million) under Canada's regional commitment of C\$5.0 million (\$545.7 million) to the Pan-American Health Organization (PAHO) to evaluate the country's needs as well as to procure and distribute supplies and protective equipment in response to the COVID-19 pandemic.

19. This section reports on country to country assistance and the assistance Jamaica receives from bilateral partners under regional programmes.

20. The annual average exchange rate of C\$1.00:\$109.14 provided by the Bank of Jamaica was used in this section.

21. This includes allocations to Jamaica under regional projects/programmes, where available.

22. This includes older men, boys, and persons with disabilities.

The following grants were approved and fully disbursed:

- Assistance amounting to C\$1.4 million (\$152.8 million) under the *Anti-Crime Capacity Building Programme* to assist with Jamaica's response to security threats through the provision of training, equipment, and technical and legal assistance. The programme focused on enhancing the country's security capacity to combat and mitigate cyber security threats, address the trade on illicit drugs, combat money laundering and stem the proceeds of crime, among others
- Additional Funding of C\$107 990 (\$11.8 million) for the five projects approved in 2019 under the *Canada Fund for Local Initiatives*²³ to, *inter alia*, establish a music centre for girls and strengthen the ecosystem of case managers in juvenile facilities
- Support in the amount of C\$105 195 (\$11.5 million) under the *CUSO International*²⁴ for initiatives on inclusive development and gender equality.

The following grants totalling C\$4.9 million (\$534.8 million) were approved and fully disbursed in an effort to assist with the country's rapid and comprehensive response

to the COVID-19 pandemic:

- Support of C\$4.7 million (\$513.0 million) under the *CARICOM Climate Adaptation Fund* towards Jamaica's 2020/2021 and 2021/2022 premiums to the Caribbean Catastrophe Risk Insurance Facility – Segregated Portfolio Company (CCRIF-SPC) to protect against natural disaster risks. This assistance allowed the Government to make available fiscal space in the country's budget to address urgent needs. The Fund is administered by the CDB.
- Funding of C\$140 900 (\$15.4 million) under the *Canada Fund for Local Initiatives* which gave special consideration to proposals that sought to improve Jamaica's ability to respond to the impacts of the COVID-19 at the community level (Table 2.5).
- Support in the amount of C\$89 233 (\$9.7 million) under the *Caribbean Disaster Risk Management-Health Sector Project* for the provision of personal protective equipment for health care workers and medical equipment and supplies for five isolation areas. The donation included 27 445 KN95 respirator masks, 457 372 surgical masks, nebulisers, automated external defibrillators, five resuscitation trolleys and patient

TABLE 2.5
DISBURSEMENTS FOR COVID-19 RESPONSE UNDER THE CANADA FUNDS FOR LOCAL INITIATIVES, 2020

PROJECT NAME	BENEFICIARIES	DESCRIPTION OF ACTIVITIES	DISBURSEMENTS
Supporting Women in Vulnerable Communities to Establish Organised Home-school Clusters	City Life Ministries, Kingston	To provide 25 tablets to children in selected inner-city communities to address gaps in their educational instruction due to changes in the education system	C\$24 100 (\$2.6 million)
Enabling Rural Women and Men in Jamaica to Start and effectively create Livelihood Businesses through Skill and Entrepreneurship Training	Grants Mountain Benevolent Society, St Ann	To establish an apiary to provide increased income source for 20 beekeepers and conduct training of 15 rural women in craft production.	C\$21 800 (\$2.4 million)
Achieving Food Security Through Climate-Smart Urban Agriculture to Mitigate the Economic Effects of COVID-19 on some of the Most Vulnerable Women and their Families	360 Recycle Manufacturing Ltd, Kingston	To engage vulnerable households in Salt Spring, Montego Bay in climate change adaptation methods, while increasing income opportunities.	C\$20 000 (\$2.2 million)
Supporting the Development of Children With Disabilities during COVID-19	Department of Child and Adolescent Health - The University of the West Indies Mona, Kingston	To provide 100 developmental and learning kits to children with disabilities to address gaps due to the inability to attend school and access learning resources.	C\$25 000 (\$2.7 million)
Caribbean Girls Hack Project: Building a Pipeline of Tech-Women in Jamaica and the Caribbean, through Digital Skills Training, Role Model Mentoring and Tech Internships	She Leads IT, Kingston	To train 1 000 girls from urban and rural high schools in ICT to improve their digital skills and prepare for the workforce.	C\$50 000 (\$5.5 million)

Source: Global Affairs Canada

23. Fund that provides assistance to non-government organizations and, in exceptional cases, international NGOs and government institutions.

24. CUSO International is a not-for-profit development organization that works to eradicate poverty and inequality through the efforts of highly skilled volunteers and collaborative partnerships.

monitors. This activity was administered by PAHO.

- Resources of C\$16 000 (\$1.7 million) under the *CUSO International* which was allocated to women led organizations, youth and community groups to address gender-based violence and to enhance economic opportunities for women negatively affected by loss of income.

Grant resources of C\$95 000 (\$10.4 million) under the *Justice Undertakings for Social Transformation (JUST) Programme* was reallocated to the Jamaicans for Justice sub-project which supports initiatives addressing gender-based violence. Assistance was provided to create an e-platform to raise awareness on violence against women and children which increased with the COVID-19 pandemic.

The following projects totalling C\$40.8 million (\$4.5 billion) ended:

- *Justice Undertakings for Social Transformation (JUST) Programme*, (2009–2020) with resources of C\$20.0 million (\$2.2 billion) – aimed to contribute to the progressive strengthening of the justice system with primary focus on providing technical assistance, capacity building and institutional strengthening. Achievements under the project included:
 - contributions to the reduction of the backlog of criminal cases through the implementation of sustainable changes to the institutional procedures and professional practices
 - establishment of a Case Information Statistics System to provide data for evidence-based decision-making in the court system
 - development of the Legislative Productive Management System²⁵ (LPMS) and Legislative Drafting Manual. A total of 88 persons (73 females) from the Ministry of Justice were trained in the use of the LPMS
 - enhanced access to justice through, inter alia, the development of information and communication products; provision of witness care (including care spaces and support to vulnerable witnesses), training of lay magistrates as well as the operationalization of two buses to provide mobile justice information services
 - provision of training to reduce discrimination and barriers to the effective participation of the Deaf and Hard of Hearing community
 - provision of office furniture and equipment

to the Supreme Court and the Westmoreland Parish Court.

- *Citizen Security and Justice Programme (CSJP) III* (2014–2020) in the amount of C\$20.0 million (\$2.2 billion) – contributed to crime and violence reduction within targeted communities by addressing the individual, family and community risk factors. The programme was co-financed by the IDB and the Foreign, Commonwealth and Development Office with loan resources of US\$20.0 million (\$2.9 billion) and grant funding of US\$16.7 million (\$2.4 billion), respectively. The achievements under the project are provided under the IDB cooperation programme.
- *Building Resilience and Adaptation to Climate Change while Reducing Disaster Risk in Peckam and Surrounding Communities in Clarendon Project* (2017–2020) with funding of C\$0.8 million (\$87.3 million) – improved community-based disaster risk management and climate adaptation. The project was implemented by the Environmental Health Foundation and was funded under the Community Disaster Risk Reduction Fund which is being administered by the CDB. Achievements under the project included the:
 - completion of 57 climate-smart and sustainable agricultural training sessions with over 400 farmers across nine communities
 - establishment of four climate resilient demonstration plots for the production of cassava, pineapples, sweet potatoes and ginger
 - construction of two climate-smart greenhouses for the Top Alston and Silent Hill Farmers Groups
 - construction of four aquaponics systems - powered by renewable energy
 - procurement of total stations²⁶ for RADA, Clarendon to assist farmers with precision land measurements including accurate contouring
 - distribution of rainwater harvesting apparatus (water tanks and pipes) and farm tools to 270 beneficiary farmers.

Jamaica also benefited under 15²⁷ regional projects and programmes in the areas of disaster risk management, public financial management, climate adaptation and resilience, energy, judicial reform and gender equality, among others. Disbursements to Jamaica under these programmes amounted to approximately C\$2.7 million (\$294.7 million).

The cooperation programme with the **People's Republic**

25. This is an electronic platform that manages the life cycle of legislative documents, from drafting to publishing. The relevant MDAs will be better able to view and track the status of proposed legislation.

26. This is an electronic/optical instrument used for surveying and building construction.

27. Allocations to Jamaica under five regional projects are represented under the bilateral cooperation programme.

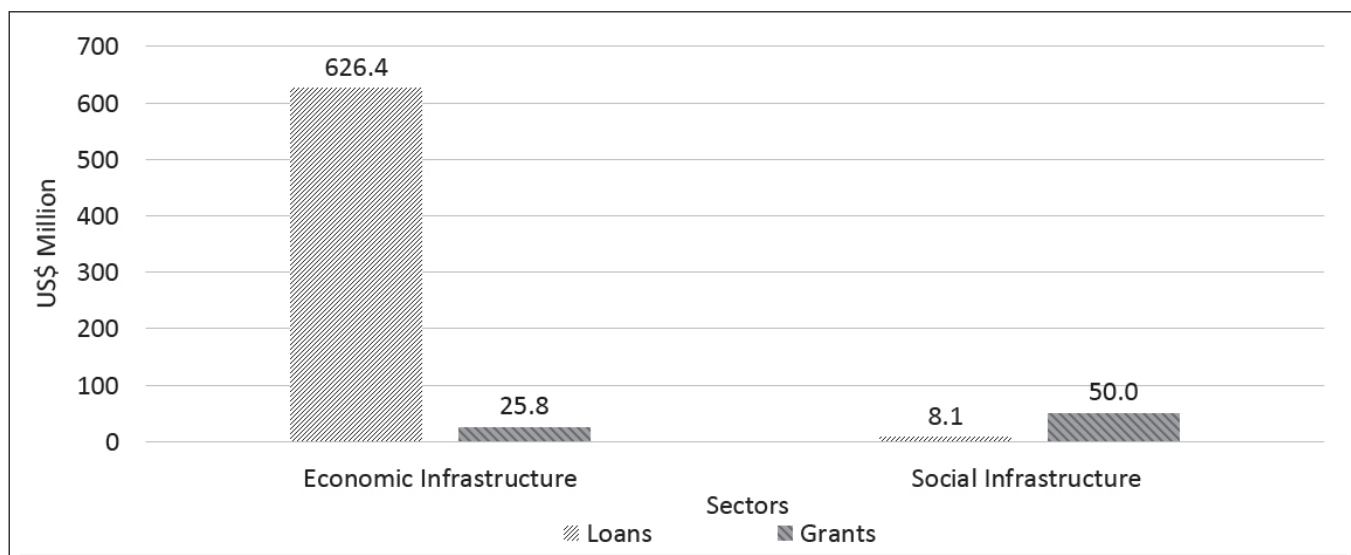


FIGURE 2J: SECTORAL ALLOCATION OF THE PEOPLE'S REPUBLIC OF CHINA'S COOPERATION PROGRAMME, 2020

of China (PRC) amounted to US\$710.3 million (\$101.8 billion) comprising three loans totalling US\$634.5 million (\$90.9 billion) including a trust fund in the amount of US\$8.1 million (\$1.2 billion) administered by the IDB. Grant resources totalled US\$75.8 million (\$10.9 billion). The Government's counterpart financing amounted to US\$110.5 million (\$15.8 billion) for two of the three loan projects.

Support under the programme focused primarily on the Economic Infrastructure sector with funding of US\$652.2 million (93.4 billion) while the Social Infrastructure sector totalled US\$58.1 million (\$8.3 billion) {Figure 2J}. Overall disbursements totalled US\$51.4 million (\$7.4 billion), a decrease of 3.9 per cent. This decrease can be attributed to delays in the execution of project activities due to the impact of the COVID-19 pandemic. Loan disbursements totalled US\$51.0 million (\$7.3 billion) while grant disbursements amounted to US\$379 300 (\$54.3 million).

The following grants were approved and fully disbursed:

- the provision of personal protective equipment valued at US\$163 800 (\$23.5 million) – included 30 000 N95 masks, 1 450 medical gowns, medical protective goggles, disposable surgical gloves, medical isolation shoe covers and thermometers in response to the COVID-19 pandemic
- *scholarships* awarded to five persons in the amount of US\$215 529 (\$30.9 million) – to pursue studies in the PRC in the areas of clinical medicine, microbiology, mathematics education as well as safety science and engineering (Table 2.6).

The following two projects with loan financing of US\$308.1 million (\$44.1 billion) ended:

- The *Major Infrastructure Development Project*

(MIDP), (2013–2020) with funding of US\$300.0 million (\$43.0 billion) and Government counterpart resources of US\$52.9 million (\$7.6 billion). The project reconstructed and rehabilitated 27 critical bridges and 430 kilometres of prioritised roads across the island including the construction of retaining walls and the execution of protective works. Works included:

- rehabilitation of Marcus Garvey Drive, Kingston (between East Avenue and Pechon Street); Mandela Highway, Kingston/St Andrew (between Six Miles Interchange and Highway 2000 Interchange); Constant Spring Road, St Andrew (between West Kings House Road and Manor Park); Ferris Cross to Mackfield Road, Westmoreland; Tombstone to Gutters main road, St Elizabeth; and Ocho Rios Bypass, St Ann
- construction of bridges in Jacob River, Portland; Silent Hill, Clarendon; Latium, St James; Kupius, Clarendon; Ward River, St Thomas; Rentcombe, St Catherine; and Tranquility, Portland.
- The *Public Sector Efficiency Programme* (2014–2020) with resources of US\$8.1 million (\$1.2 billion) which was administered by the IDB. The project intended to improve public sector services and was co-financed with loan funding of US\$10.1 million (\$1.4 billion) from the IDB and grant resources of US\$6.6 million (\$945.6 million) from the EU. The achievements under the project are provided under the IDB cooperation programme.

The Government of the **Republic of Cuba**, under the

Jamaica/Cuba Bilateral Scholarship Programme, awarded scholarships amounting to US\$381 920 (\$54.7 million) in the disciplines of medicine, general surgery, internal medicine and nursing (Table 2.6). Support was also provided under the Jamaica/Cuba Technical Cooperation Health Agreement and Cuban Teacher Recruitment Programmes with a total of 511 experts dispatched (Table 2.7).

Support was provided by the Government of **India** in the amount of US\$100 000 (\$14.3 million) for the provision of 80 000 hydroxychloroquine tablets and other medicines used to treat serious ailments which are priorities for the Jamaican health sector.

The cooperation programme with the Government of **Japan**, channelled primarily through the Japan International Cooperation Agency (JICA), totalled US\$36.7 million (\$5.3 billion) comprising a loan in the amount of US\$15.0 million (\$2.1 billion) and grants totalling US\$21.7 million (\$3.1 billion). A total of US\$2.4 million (\$343.8 million) of the grant resources were provided through trust funds administered by the IDB. Counterpart resources amounted to US\$231 700 (\$33.2 million).

The sectoral allocation was as follows – Economic Infrastructure, US\$19.3 million (\$2.8 billion); Environment and Climate Change, US\$13.9 million (\$2.0 billion); and Social Infrastructure, US\$3.5 million (\$501.4 million). Grant disbursements totalled US\$6.7 million (\$959.9 million) representing a US\$5.4 million (\$773.7 million) increase as a result of five new grants being approved and fully disbursed totalling US\$6.2 million (\$888.3 million). Loan disbursements was US\$5 700 (\$0.8 million), a decrease of US\$463 448 (\$66.4 million) due to delay in project implementation.

The following grants totalling US\$2.7 million (\$386.8 million) were approved:

- *Provision of Assistance to the Response to the COVID-19 Pandemic Programme 2020–2021* with funding of US\$1.9 million (\$272.2 million) – to provide medical equipment and supplies such as bedside X-ray machines and monitors, X-ray protection screens and monitors, ultrasound scanners and defibrillators
- *Improvement of Solid Waste Management Project* with funding of US\$0.8 million (\$114.6 million) – to assist the GOJ with the preparation of closure plans and designs for the Riverton Disposal Site, completion of studies to support the business case, and the re-orientation of the National Solid Waste Management Authority (NSWMA) to support the preparation of a viable business case for improvement of solid waste management in Jamaica. This project is being administered by the IDB.

The following two initiatives under the Grassroots Grants Programme were approved and fully disbursed:

- *Improvement of Emergency Response Transportation at Mandeville Regional Hospital* with funding of US\$84 158 (\$12.1 million): aimed to strengthen and improve capacity for emergency response in Southern Jamaica, with a focus on managing and responding to health crises, including the COVID-19 pandemic. Under this initiative an ambulance was provided to be used at the hospital to assist in boosting the delivery of quality health care and emergency response services
- *Improvement of School Transportation System at Richmond Park Primary School* with resources of US\$67 985 (\$9.7 million) – provided a coaster bus to facilitate safe transportation of children in the community to school.

The *Education Sector Transformation Plan Learning and Teaching Project* with funding of US\$0.5 million (\$71.6 million) ended. This project was administered by the IDB. Achievements under the project included the:

- development of the National School Leaving Certificate mobile App
- development of the Quality Assurance Standards for initially 10 teacher training educational institutions including Moneague College, Mico University College and the College of Agriculture, Science and Education to strengthen internal quality assurance mechanism
- strengthening of early childhood modernization initiatives by training 200 parent support mentors and facilitators along with 100 Early Childhood Practitioners.

The cooperation programme with the Government of the **Republic of Korea** totalled US\$2.9 million (\$415.5 million) in grant resources including trust funds of US\$0.6 million (\$86.0 million) administered by the IDB. The sectoral allocation was: Administrative, US\$0.8 million (\$114.6 million); Environment and Climate Change, US\$1.0 million (\$143.3 million); and Social Infrastructure, US\$1.1 million (\$157.6 million). Disbursements amounted to US\$1.3 million (\$186.3 million) an increase of US\$1.0 million (\$143.3 million). This increase resulted from the approval and full disbursement of the following initiatives:

- *Jamaica Customs Modernization Project* with resources of US\$0.7 million (\$100.3 million) – aimed to adapt to changes in the international trade environment and to modernize the Jamaican customs administration to improve Jamaica's international trade. Under the project 240 persons were trained in the areas of Risk Management and Advance Passenger Information Systems, Data Warehouse Management (Data analysis) and Introduction to Korea Customs Service's information system UNI-PASS
- *COVID-19 Support*, valued at US\$0.5 million (\$71.6 million) – consisted of emergency supplies, testing

kits and equipment as well as financial assistance to the Mustard Seed Community, Agape Heart Movement and Walford Lily Donald Foundation

- *Post Project Support to the Cadastral Mapping and Land Registration Project* with funding of US\$100 000 (\$14.3 million) – provided management support for the registration of lands and cadastral survey/mapping equipment.

Enhancing Transparency and Service Delivery through the Implementation of the National Identification System (NIDS) project, valued at US\$0.6 million (\$86.0 million) ended. The assistance aimed to support the advancement of the procurement process to ensure the smooth implementation of the NIDS project and to increase the institutional capacity of the GOJ in this area. Under the project the following were achieved:

- conducted five workshops locally and overseas aimed at building the knowledge of the NIDS implementation team and related parties. Additionally, international best practices and lessons learnt from the experiences in other countries such as Korea and Estonia were garnered
- developed the final draft of the NIDS policy
- developed a business process and system design which gives an overview of the system and identifies the main components that will be used for developing the NIDS.

The **Kingdom of Morocco** approved grant funding amounting to US\$1.8 million (\$257.9 million) for the following two pilot projects supporting the Directly Productive Sector:

- *Agri-Business Cold Chain for Jamaica (ABC Jamaica) Project* in the amount of US\$1.0 million (\$143.3 million) – intends to develop a cold chain system for at least six farmer cooperatives, including at least one women farmer’s cooperative. The project will provide a temperature-controlled system that will offer an uninterrupted series of refrigerated storage and distribution activities to preserve and extend the shelf life of fresh agricultural produce.
- *Soil Fertility Mapping Project* totalling US\$0.8

million (\$114.6 million) – aims to develop a soil fertility map for a pilot cultivated area of 718 hectares in Essex Valley, St Elizabeth, as well as to expand national capacity to update and utilize island-wide soil fertility maps.

Assistance from the **United Kingdom**, primarily through the Foreign, Commonwealth and Development Office²⁸ (FCDO), comprised grant funding totalling £107.5 million (\$19.9 billion)²⁹ including a trust fund administered by the IDB with resources of £1.9 million (\$352.1 million). The portfolio was augmented by Government counterpart resources of £0.7 million (\$129.7 million).

The Directly Productive sector continued to be the major focus under the cooperation with resources of £52.9 million³⁰ (\$9.8 billion) provided to improve irrigation systems for increased agricultural production. The remaining sectors were allocated as follows: Administrative, £22.4 million (\$4.2 billion); Social Infrastructure, £30.3 million (\$5.6 billion);³¹ and Environment and Climate Change, £1.9 million (\$352.1 million). Disbursements totalled £7.9 million (\$1.5 billion), an increase of 18.8 per cent as a result of funds being allocated to Jamaica in response to the COVID-19 pandemic.

The following grants totalling £20.4 million (\$3.8 billion) were approved:

- *Serious Organised Crime and Anti-Corruption Programme* with funding of £17.3 million (\$3.2 billion) – to build the investigative capacity of selected partners and close the loopholes in the justice system that hinders the prosecution of cases
- *Blue Carbon Restoration in Southern Clarendon Project* in the amount of £1.9 million (\$352.1 million) – supported under the UK Blue Carbon Fund³² and is administered by the IDB. The project intends to restore the mangrove ecosystems in Southern Clarendon to viable and optimally functioning coastal-forested ecosystems
- *Responding to COVID-19 in the Caribbean Project* with resources of £0.9 million (\$166.8 million) – to

28. In September 2020, the Foreign Commonwealth Office merged with the Department for International Development (DFID) creating the Foreign, Commonwealth and Development Office.

29. The annual average exchange rate of £1:00:\$185.29 provided by the Bank of Jamaica was used in this section.

30. In 2020, there was a reduction in the allocation to Jamaica under the UK-Caribbean Infrastructure Partnership Fund (UKCIF) from £53.2 million to £52.9 million.

31. This includes allocation to Jamaica under the regional project *Strengthening Health Facilities in the Caribbean* in the amount of US\$5.0 million which is being administered by the PAHO. Disbursements to Jamaica under the project began in 2020.

32. The Fund promotes the sustainable management, conservation and restoration of mangrove habitats by developing and embedding operational blue carbon markets across the Caribbean and Latin America that provide local communities with a sustainable income and assist in moving low-income countries towards low-emission and climate-resilient development.

help contain the spread of the COVID-19 pandemic and mitigate some of its health, social, economic and security impacts. Assistance, thus far, included the donation of 278 165 masks, 73 100 face shields, 9 oxygen concentrators, as well as extraction kits and supplies for 10 000 COVID-19 tests

- *UK-Jamaica COVID-19 Strategic Border Health Security Project* with funding of £325 000 (\$60.2 million) – to support the Passport Immigration and Citizenship Agency to develop and implement strategies to re-open and enhance border security to ensure safe passenger movement.

Scholarships amounting to £160 472 (\$29.7 million) were awarded in the areas of clinical psychology and mental health, food technology (quality assurance), international law, and hydrology and water resources management for study in the UK (Table 2.6).

The following grants amounting to £30.2 million (\$5.6 billion) ended:

- *Caribbean Anti-Corruption Programme* (2015–2020) with an allocation of £14.0 million (\$2.6 billion) – supported the Financial Investigations Division to recover assets acquired by corruption or organised crime, strengthened the capacity of the Major and Organised Crime Anti-Corruption Agency (MOCA), supported the Independent Commission of Investigations (INDECOM) to hold public officials accountable and assisted the GOJ in the establishment of an Integrity Commission to fight corruption and strengthen accountability.
- *Citizen Security and Justice Programme (CSJP) III* (2014–2020) with funding of £11.0 million (\$2.0 billion) – administered by the IDB, targeted interventions to improve safety, security and prosperity of persons living in 50 of the most vulnerable and volatile communities in Jamaica. The programme was co-financed by the IDB and the Government of Canada with loan resources of US\$20.0 million (\$2.9 billion) and grant funding of US\$16.0 million (\$2.3 billion), respectively. The achievements under the project are provided under the IDB cooperation programme.
- *United Kingdom Visa Application Centre* initiative (2014–2020) in the amount of £4.5 million (\$833.8 million): implemented by the International Organization for Migration, supported the processing of visa applications in Jamaica on behalf of the UK. In 2020, the number of applications processed was 3 173.
- *Jamaica Strategic Corrections Partnership Project* (2017–2020) with resources of £0.7 million (\$129.7 million) – improved the capacity of the Department

of Correctional Services to reduce recidivism of young offenders and supported the reintegration of convicts from the correctional system back into the society including referrals of those at risk of re-offending into relevant programmes.

Jamaica also benefited under four regional and global programmes amounting to approximately £115.0 million (\$21.3 billion) in the areas of public financial management, disaster preparedness and recovery and climate resilience.

The cooperation programme with the Government of the **United States of America**, through the United States Agency for International Development (USAID), comprised grant assistance of US\$93.3 million (\$13.4 billion) for 16 initiatives. Sectoral distribution was Administrative, US\$1.0 million (\$143.3 million); Environment and Climate Change, US\$12.0 million (\$1.7 billion) and Social Infrastructure, US\$80.3 million (\$11.5 billion). Disbursements totalled US\$10.7 million (\$1.5 billion) a 35.5 per cent decrease compared with the previous year as a result of limited activities under the portfolio due to the COVID-19 pandemic, as well as the slow start up under the new country strategy 2020–2025.

The following grants were approved:

- *Community Violence Prevention project* totalling US\$15.3 million (\$2.2 billion) – will support Jamaican communities, parents, and families to prevent youth violence. Activities will include school safety programmes, parenting interventions, conflict resolution sessions, literacy training, business and entrepreneurship training and job placement assistance. The project will also address gender dimensions of violence, as well as help adolescent mothers to develop parenting skills.
- *Health Connect Jamaica project* totalling US\$1.6 million (\$229.2 million) – seeks to establish new partnerships with the private health sector, including building a private sector network of clinicians that target HIV/AIDS patients. The network will model ways in which the private sector can play an official role in Jamaica’s vision for multi-sectoral HIV/AIDS care by facilitating linkages of private sector data to the public database.
- *Strengthening Jamaica’s Electoral Democracy project*, valued at US\$1.0 million (\$143.3 million) – will help to promote political accountability on the part of political parties and candidates as well as increase voter’s knowledge of political parties’ programmes and ultimately help improve citizens’ participation in elections. Project activities will help to strengthen Jamaica’s electoral democracy while promoting free, fair, and transparent elections.

- *COVID-19 Response*, valued at US\$0.9 million (\$128.9 million), from the United States' Centers for Disease Control and Prevention (CDC) – to strengthen the country's preparedness and response to COVID-19 outbreaks. This support is being administered by PAHO.
- *Strengthening Capabilities of Member States in Building, Strengthening and Restoring Capacities and Services in Case of Outbreaks, Emergencies and Disasters – COVID-19 assistance*, valued at US\$177 236 (\$25.4 million) – aims to support member states in their efforts to restore capacities, competencies and services in case of outbreaks, natural emergencies and disasters. This assistance is being implemented by the International Atomic Energy Agency.

The following grants were approved and fully disbursed in response to the COVID-19 pandemic:

- *Donation of a Field Hospital to support Jamaica's management of the COVID-19 pandemic*, US\$1.1 million (\$157.6 million) – housing up to 70 patient beds and includes a High Efficiency Particulate Air (HEPA) and ultraviolet-light air-scrubber system, two diesel generators, and eight air conditioning units. Medical teams using the hospital can configure it to isolate patients and conduct surgical operations, if needed. A team of medical trainers also instructed Jamaican medical and support teams chosen to run the mobile hospital on its assembly, use, disassembly, transportation and storage.
- *Local Partner Development Project* with additional resources of US\$1.0 million (\$143.3 million) was provided to the project to assist persons under the Community Renewal Programme with enhanced medical services to prevent infection.
- *Assistance to the COVID 19 pandemic channelled through PAHO* (April–December 2020) with funding of US\$0.7 million (\$100.3 million). The resources were used to support:
 - case management to strengthen clinical care while minimizing the risk of onward transmission to others
 - infection prevention and control in health-care facilities
 - media campaigns to educate people on the steps they can take to prevent and respond to the spread of the virus
 - surveillance and rapid response to enhance with case-finding and event-based surveillance for COVID-19.
- *Controlling the HIV Epidemic Project* with additional funding of US\$300 000 (\$43.0 million) – to focus on the vulnerable group of people living with HIV during the pandemic. The support focused on the development of social media campaigns to raise awareness of prevention measures and good hygiene practices through behavioural change communication and community engagement.

The following six projects with funding of US\$40.4 million (\$5.8 billion) ended:

- *Jamaica Rural Economy and Ecosystems Adapting to Climate Change II (Ja REEACH II)*, (2015–2020) totalling US\$12.0 million (\$1.7 billion) – was an expansion of the Ja REEACH (2010–2015) project which promoted the protection of rural lives, livelihoods and ecosystems through interventions that increased and strengthened climate change resilience. The project:
 - developed a training curriculum for branch managers of Micro-finance Institutions (MFI) to address areas of weaknesses and supported the design of an MFI branch manager's training manual to improve the performance of their microfinance lending portfolios.
 - Supported 102 institutions to mainstream climate and disaster risk reduction in development planning
 - supported 79 value chain actors to market climate-smart agriculture products to 171 stakeholders implementing risk-reducing practices and actions.
- *Combatting Corruption and Strengthening Integrity in Jamaica* (2016–2020), totalling US\$12.0 million (\$1.7 billion) – challenged corrupt practices nationally, and foster public support for action against corruption. The project increased the capacity of partner organizations such as National Integrity Action (NIA), Community Based Organizations (CBOs) and MDAs to build public demand for action against corruption as well as raised awareness of the ways that Jamaicans can address corruption effectively. This initiative was implemented by the NIA.
- *Health Policy Plus* (2018–2020), valued at US\$4.5 million (\$ 644.7 million) – aimed to plan and implement services that reduce HIV transmission among key populations and their sexual partners and extend the lives of those already living with HIV. The project developed:
 - a comprehensive package for healthcare providers/workers to address Gender-based Violence (GBV) for clients of healthcare facilities in Jamaica

- a Stigma and Discrimination (S&D) Reduction Video and disseminated same to health facilities across the island
 - the People Living with HIV Stigma Index 2.0.
- *A New Path: Promoting A Healthy Environment and Productive Alternatives for Juvenile Remandees and Offenders in Jamaica* (2014–2020), valued at US\$4.4 million (\$630.4 million) – aimed to improve the lives of children and juveniles in conflict with the law and increasing their chances of successfully reintegrating into society. This initiative worked with remandees and offenders across Jamaica and was administered by the Organizations of American States. The project:
- strengthened the capacity of the Department of Correctional Services (DCS) to offer better care to youth
 - created 49 businesses whereby youth who participated in a residential programme (called “Pitch It” – learning by doing) received micro-grants to establish self-owned businesses that benefit themselves and families
 - trained 22 youth in establishing micro-farms in their rural communities
 - developed a new holistic reintegration curriculum and the implementation of “train-the-trainer” courses to strengthen the capacity of staff at the juvenile facilities to deliver these activities
 - constructed an outdoor sports court and a multipurpose building to accommodate up to three classrooms, including an information technology laboratory and a cosmetology area.
- *Transitional Living Programme for Children in State Care* (2014–2020) totalling US\$4.2 million (\$601.7 million) – aimed to improve the transition to independent living for Jamaican children leaving residential care at 18 years and reduce the risk factors associated with low education or job and inadequate life skills. The project:
- built and furnished two transitional houses for 52 youth
 - provided skills training for 770 youth
 - trained Child Protective and Family Services Agency (CPFSA) officers, mentors and mentees in life skills
 - provided starter kits which facilitated the acquisition of documents such as Passport and Tax Registration Numbers applications for youth who aged out of state care
 - procured an electronic case management system and 80 laptops to be used by CPFSA field officers
 - purchased 1 500 tablets for the Ministry of Education Youth and Information “One Laptop or Tablet Per Child” Initiative
 - provided 39 scholarships to the UWI Open Campus for at risk youth in the programme.
- *Linkages* (2018–2020), valued at US\$3.3 million (\$472.8 million): aimed to establish new partnerships with the private health sector, including building a private sector network of clinicians that targeted HIV/AIDS patients. The project:
- implemented three regional capacity building workshops with peer navigators, their supervisors and monitoring and evaluation representatives. Participants were trained on using peer navigation data to support programmatic decision making.
 - conducted train of trainers workshops, as well as developed national guidelines for online outreach programmes and data collection templates for the tracking of online-recruited clients.

Scholarships and Training

The improvement of the quality of Jamaica’s human capital continued to be of great importance with the provision of scholarship and training opportunities from bilateral partners amounting to US\$1.3 million (\$186.3 million) {Table 2.6}.

TABLE 2.6
SCHOLARSHIPS & TRAINING AWARDED THROUGH ODA, 2020 (US\$)

INTERNATIONAL DEVELOPMENT PARTNER	DISCIPLINE	CERTIFICATIONS							Value of Award	No. Males	No. Females
		PhD	MBBS	LLM (Law)	Masters	Bachelors	Associate Degree	Short Course			
Bilateral Partners											
People's Republic of China	Clinical Medicine, Safety Science and Engineering, Microbiology and Mathematics Education	1			2	2			215 529	2	3
Cuba	Medicine, General Surgery, Internal Medicine and Nursing				2	7			381 920	2	7
Japan	Operation and Maintenance of Sewerage System, Nature Conservation, energy policy, Market Oriented Export Promotion Strategy / Marketing Strategy and Comprehensive Disaster Risk Reduction in Small Islands	1			2			5	375 000	9	8
Russia	Medicine					1			92 450	1	
Serbia	Mechanical Engineering and Civil Engineering					2			15 540	2	
UK Commonwealth	Clinical Psychology and Mental Health, Food Technology (Quality Assurance), Hydrology and Water Resources Management and Public International Law				4				207 537	2	2
TOTAL		2			10	12		5	1 287 976	18	20

The table reflects the accumulative value

Source: Planning Institute of Jamaica, Bilateral Partners, the Ministry of Finance and the Public Service and the Ministry of Foreign Affairs and Foreign Trade

TABLE 2.7
PERSONNEL ASSIGNED TO JAMAICA BY ORGANIZATIONS AND FOCAL AREAS, 2020

COUNTRY	ORGANIZATION/ PROGRAMME	NO. OF PERSONNEL	FOCAL AREAS/SPECIALITY
Cuba	Teaching Programme	18	Spanish, Mathematics and Chemistry
	Medical Programme	295	Registered Nurses
		152	Medical Doctors
		25	Health Technicians
		17	Biomedical Engineers
		4	Head Office including a National coordinator (Doctor), Accountant, Driver and Technical Coordinator for Cuba-Jamaica Eye Care Programme
Japan	Japan Overseas Cooperation Volunteers Programme	5	Education, Tourism, Craft Production, Business Development and Japanese Language
TOTAL		516	

Source: Bilateral Partners, Ministry of Health and Wellness and the Ministry of Education, Youth and Information

MULTILATERAL TECHNICAL COOPERATIONS (MTCS)

The total portfolio of the Multilateral Technical Cooperations (MTCs) is funded by grant resources from the collaborating 12 UN Agencies, the Commonwealth Secretariat and the Organisation of American States (OAS). The grants are provided either from the agencies' core resources or from funds administered by the Agencies on behalf of donors.

The **Commonwealth Secretariat** had a portfolio of 12 projects for £7.3 million (\$1.4 billion) to support the Administrative £2.1 million (\$389.1 million); Environment and Climate Change £ 0.8 million (\$148.2 million); Social Infrastructure £2.5 million (\$463.2 million); and Economic Infrastructure sectors £2.0 million (\$370.6 million). There were no new or completed projects over the period. The disbursement was £128 575 (\$23.8 million).

The **Food and Agriculture Organization (FAO)** supported a portfolio of 15 national initiatives totalling US\$2.3 million (\$329.5 million). The Programme continued to focus on strengthening capacities for surveillance and prevention of Banana Fusarium Wilt Disease; building public-private partnerships aimed at driving market-led agricultural development; climate resilience; family farming; and school feeding. Additionally, there was the inclusion of two COVID-19 initiatives for response and recovery in agriculture.

The sectoral allocation of the portfolio was Directly Productive, US\$1.9 million (\$272.2 million), and Environment and Climate Change, US\$352 344 (\$50.5 million). Disbursements totalled US\$0.6 million (\$86.0 million) compared with US\$487 180 (\$69.8 million) in 2019. The increase in disbursement was due to the funding of three new projects, which together accounted for 35.0 per cent of the funds disbursed.

The FAO approved funding of US\$0.7 million (\$100.3 million) to support the following three projects:

- *Enhancing Jamaica's Agricultural Response and Recovery to COVID-19*, US\$300 000 (\$43.0 million) – intended to support the Government in strengthening its Farmers' Acquisition Programme during the COVID-19 pandemic
- *Inclusive and Resilient Agri-Food System in Rural and Peri-Urban Territories of Kingston* US\$320 000 (\$45.8 million) – to implement an integrated mechanism comprising business incubator services and technological tools and approaches that enable small farmers and small agro-processors to create and/

or leverage business opportunities in the agro-food industry

- *Resilience in Agriculture and Market Systems for COVID-19 Response Project (RAMS)* US\$100 000 (\$14.3 million) – to support the government in: implementing the public purchasing mechanisms; upgrading the cold chain for agriculture³³; using technical tools to strengthen the resilience of Agro-food systems to COVID-19; and reducing economic vulnerability as well as the impact of natural disasters.

The following three projects totalling US\$280 000 (\$40.1 million) ended:

- *Port State Measures Support Project (2017–2020)* US\$180 000 (\$25.8 million), supported – the review and validation of the legal framework for Port State Measures³⁴ and related standard operating procedures; and the development of guidelines for a mechanism to foster inter-agency cooperation for the effective implementation of the processes.
- *Food Systems that favour the Implementation of Strategies to Facilitate Physical and Economic Access of Healthy Foods to Vulnerable Populations (2018–2020)*, US\$50 000 (\$7.2 million) – under which a study on Kingston Food System was conducted to inform policy decisions that resolve or mitigate restrictions on the physical and economic access of vulnerable populations to healthy foods.
- *Strengthening Regional Capacities for Surveillance, Prevention, and Eventual Response to Banana Fusarium Wilt³⁵, Cubense Tropical Race4 (FOC TR4) (2019–2020)* US\$50 000 (\$7.2 million) – supported the development of mechanisms and tools to prevent, monitor and respond to the threat posed by the disease. A regional inception workshop was held to discuss the main approaches in addressing the FOC TR4 and to provide support for the preparation of a roadmap to guide the processes involved. Nine kits were also distributed under the project.

The **Global Environment Facility Small Grants Programme (GEF/SGP)** comprised 22 national projects with financing of US\$4.2 million (\$601.7 million), to support capacity building for NGOs, which were selected through open biennial calls for proposals. The portfolio focused entirely on the Environment and Climate Change sector. The projects were implemented in the areas of combating deforestation; conservation of biodiversity; building resilience to climate change; enhancing conservation mechanisms of the marine ecosystems;

33. This is a COVID-19 response Programme of the Ministry of Agriculture and Fisheries that links purveyors to buyers.

34. This is an international agreement to prevent and eliminate illegal, unreported and unregulated (IUU) fishing.

35. This is a lethal fungal disease caused by the soil-borne fungus *Fusarium oxysporum* f. sp. *cubense* (Foc)

and increasing the use of renewable and energy efficient technologies.

A total of US\$392 205 (\$56.2 million) was disbursed compared with US\$0.8 million (\$107.4 million) in 2019. This decrease was primarily due to delays in implementation resulting from the COVID-19 Pandemic. A portion of the funds was repurposed to provide care packages consisting of food items, sanitisers and personal protective equipment (PPE), which were distributed to 209 persons (154 males) in Lucea, Hanover; and sanitation equipment including a water tank which was placed in the Sawyers community in Trelawny to aid in hand washing.

GEF/SGP approved funding of US\$224 900 (\$32.2 million) for two new projects:

- *Mitigating Deforestation and Enhancing Livelihoods through Climate Smart Agriculture Technology and Knowledge Platform in the Springvale Community* US\$142 100 (\$20.4 million) – to equip farmers in two communities with knowledge to increase their productivity and build resilience while reducing their vulnerability to climate change.
- *Conserving the Natural Resources through Innovative Agricultural Techniques in the Negril Environmental Protection Area* US\$82 800 (\$11.9 million) – to conserve the natural resources in the area, through innovative agricultural techniques³⁶.

The following six projects totalling US\$0.7 million (\$100.3 million) ended:

- *Preserving Natural Resources while Generating Sustainable Livelihoods in the Sawyers Community*, (2018–2020), US\$211 882 (\$30.4 million). Among the achievements were:
 - construction of a storage and honey processing facility with solar PV system,³⁷ water tank and gutters to facilitate rainwater harvesting
 - procurement of 60 colonies of bees
 - planting of 1 250 timber trees in the Cockpit Country
 - installation of a 650 gallon water tank (under the COVID-19 initiative) and distribution of 50 care packages to poor and disabled

individuals

- bottling and sale of honey, production and sale of hair care products made from the honey wax, as well as sale of screen printed t-shirts
 - completion of nine environmental awareness workshops, in collaboration with the Forestry Department and RADA, to mitigate the effects of climate change and global warming, as well as to support COVID-19 safety protocols and sustainable farming. Beneficiaries included 530 farmers (252 men) including 147 youth.
- *Evaluating Discovery Bay Inshore Coastal Water Quality to Improve Capacity for Environmental Management (2017–2020)*, US\$61 125 (\$8.8 million). The achievements included:
- training and certification of three fishermen as professional divers by the Professional Association of Diving Instructors, to assist with reef surveys, and, convening of a workshop to inform the public on the findings of the surveys. Recommendations were made for a reduction in the levels of anthropogenic pollutions impacting marine environment by eliminating soak away pits, installing septic tanks and recycling of grey water
 - training of three female fishers to carry out chemical analysis of water quality and testing for total nitrogen, phosphate, biological oxygen demand³⁸ and coliform as well as pH conductivity and salinity
 - using communication tools (posters, videos, power point presentations) to inform communities of the Discovery Bay Inshore about water quality and to promote strategies for improvement
- *Biodiversity Restoration in the Portland Bight Protected Area through Community Engagement (2017–2020)* US\$86 000 (\$12.3 million), which achieved the:
- upgrading of a seedling nursery for fruits, timber and mangrove
 - establishment of trail restoration plots³⁹ to promote the regeneration of the dry forests of Portland Ridge

36. Innovative agricultural techniques – Technology, practice or product handling that will bring increased yield and income to the farmer. Modern/ improved or superior production technique used to improve production or quality and quantity at a given time, e.g. of such techniques are vertical cultivation, use of drones and bees to propagate fields.

37. A *photovoltaic system*, also *PV system* or *solar power system*, is a power *system* designed to supply usable *solar* power by means of photovoltaics

38. Biological oxygen demand – a measure of the amount of oxygen required to remove waste organic matter from water in the process of decomposition by aerobic bacteria

39. Trail restoration plots – creation of pathways to ensure ease of access, reduced soil compaction and serve as a fire break

- preparation of a dry forest restoration plan, along with placement of poster boards in the forest to promote the value and importance of the dry forest ecology, as well as to highlight the plants and animals existing in the area
 - certification of 15 persons (eight women), including five youth, as fire wardens and as part of the Conservation Garden Programme.
- *Building Resilience and Adaptation to Climate Change and Disaster Risk Reduction of Persons with Disability and other vulnerable Groups in Jamaica* (2019–2020) US\$94 350 (\$13.5 million), achieved the following:
- the booklet, “When Disaster Strikes be Ready – A Survival Guide for Persons with Disabilities” was printed in braille (1 000 copies). Some 3 000 copies of the same booklet were also done in large print and distributed islandwide to parish libraries and other organizations
 - some 200 copies of the booklet “*Alignment of Vision 2030 Jamaica with the Sustainable Development Goals (SDGs)*” were printed in braille
 - five schools participated in poster, poetry, essay and special projects⁴⁰ competitions on Climate Change and Disaster Risk Reduction, with entries from 25 students (16 boys)
 - a solar-powered water pump was given to one farmer group to support aquaponics farming activities.
- *Blue and John Crow Mountains National Park and World Heritage Site – Linking Natural and Cultural Heritage Conservation* (2017–2020) US\$202 676 (\$29.0 million) – achieved the reforestation of selected sites with over 1 200 fruit, lumber and other trees planted. In addition, a Hutia Population Study⁴¹ was completed, along with a conservation management plan which was presented to the public through a webinar organized by National Environment and Planning Agency (NEPA).
- *Climate Change Training and Capacity Building for NGOs/CBOs and Persons with Disabilities* (2019–2020) US\$60 000 (\$8.6 million) – supported the translation to braille and copying of two documents: 65 copies of ‘*The State of the Jamaican Climate – Information for Resilience Building – Summary for Policymakers 2015*’; and 15 copies of the ‘*Caribbean Climate Series: Vol 1: 1.5 To Stay Alive*’.

The Global Fund to Fight AIDS, Tuberculosis and

Malaria had total funding of US\$12.8 million (\$1.8 million) for two projects from which it disbursed US\$5.0 million (\$716.4 million) to support the National HIV/AIDS Programme in Jamaica. The portfolio included one new project, the *COVID-19 Response Mechanism*, which was approved and fully disbursed in the amount of US\$0.8 million (\$114.6 million).

The programme with the **International Atomic Energy Agency (IAEA)** comprised seven national projects totalling €2.0 million (\$370.6 million) which included counterpart funding of €101 425 (\$ 16.2 million). The sectoral allocation of the portfolio was Economic Infrastructure €0.5 million (\$79.7 million), Environmental and Climate Change, €0.6 million (\$95.6 million), and Social Infrastructure, €0.9 million (\$143.4 million).

The IAEA provided assistance to Jamaica in areas such as vector borne disease prevention, marine pollution management, water management, food and agriculture, nuclear medicine and nuclear and atomic physics. A total of €320 301 (\$51.0 million) was disbursed, representing a decrease of €0.9 million (\$151.2 million) compared with 2019. The lower level of disbursement was due to a reduction in the number of national projects in implementation.

The **International Organization for Migration** had a portfolio of five projects, for US\$1.2 million (\$171.9 million), which supported the Administrative sector US\$0.7 million (\$100.3 million) and the Social Infrastructure sector US\$0.5 million (\$71.6 million). Areas of focus included: disaster risk management; repatriation and post arrival support to migrants; and protection of migrant workers. Total disbursement was US\$169 950 (\$24.3 million). One project totalling US\$5.9 million (\$845.3 million) was administered on behalf of the United Kingdom and another totalling US\$280 966 (\$ 40.3) was administered by the European Union.

One new project, *Strengthening Jamaica’s Disaster Risk Management and Preparedness Capacity* for US\$300 000 (\$42.7 million) was approved. The project seeks to assist public and private institutions to sustainably implement risk reduction strategies after project completion.

Repatriation and Post Arrival Support to Migrants US\$19 912 (\$2.9 million) was approved and fully disbursed. The project supported measures to minimize the vulnerability of immigrants. Three females and one male were voluntarily repatriated to Jamaica and all four individuals provided with reintegration support.

The *Protection of Jamaican Labour Migrants by Promoting Ethical Recruitment Practices* (2017–2020) US\$100 000 (\$14.3 million) ended. It sought to encourage

40. Special projects – NEPA’s school projects on reducing litter, recycling, agriculture and wildlife

41. Hutias are moderately large cave-like rodents of the family Capromyidae that inhabit various Caribbean Islands, including Jamaica

ethical practices in the recruitment of Jamaican migrant workers. Three documents were published and distributed to public libraries and Government stakeholders in Jamaica and across the Caribbean region:

- Circular Labour Migration in Jamaica: An assessment of the existing recruitment, regulatory and monitoring mechanism
- Circular Labour Migration in Jamaica: Mapping the Labour Supply Chains for Government and Private Sector Programmes
- An Assessment of the Government of Jamaica's Pre-Departure Orientation Curriculum for short term Circular Migration Programmes

Additionally, a regional workshop on labour migration was conducted to analyze gaps in regulation policies and key challenges and obstacles, as well as to highlight innovative best practices and the effects of COVID-19 on these practices.

The **Organization of American States (OAS)** portfolio supported three national projects with combined funding of US\$53 000 (\$7.6 million). The total portfolio was solely for the Administrative sector to support areas including, improvements in cybersecurity systems and capacity strengthening for Counterdrug Officers in the detection of illegal drugs.

The following projects were approved:

- *The Mapping of Treatment and Prevention Institutions and Training Needs Assessment in the OAS Caribbean Member States*, for US\$13 000 (\$1.9 million) – to identify organizations to be trained in Universal Prevention Curriculum and Universal Treatment Curriculum for drug use prevention and or drug treatment. In addition, it will update the 2011 listing of regional organizations to facilitate an improvement in communication among organizations with similar goals and objectives.
- *Precursor Chemical, Synthetic Drugs and New Psychoactive Substances (NPS) Control* US\$15 000 (\$2.1 million) – to strengthen the capacity of drug investigators, forensic technicians, and counterdrug interdiction officers from Jamaica to counter the diversion of precursor chemicals.

The *Caribbean Counterdrug Intelligence Training School (CCTS)*, US\$25 000 (\$3.6 million) was approved and fully disbursed. The initiative provided specialized training to counterdrug officers from different agencies in charge of drug control in the Caribbean. In partnership with the school and through strategic alliances with key

counterparts and stakeholders, CICAD/SRU⁴² provided specialized training to OAS Caribbean member states, based on identified needs. Training in Regional Drug Investigations was provided for 12 Drug Control Officers.

The **Pan American Health Organisation/World Health Organisation (PAHO/WHO)** had a portfolio amounting to US\$2.2 million (\$315.2 million) to support seven projects in the Social Infrastructure sector. Specific projects were implemented in the areas of health systems strengthening, infrastructural improvement, mental health, cancer care and COVID-19 response. The total disbursed amount was US\$2.1 million (\$300.9 million) compared with US\$2.3 million (\$329.5 million) with the previous year. Two projects were administered on behalf of the United Kingdom, amounting to US\$5.5 million (\$0.8 million); two projects were administered on behalf of Canada, amounting to US\$0.6 million (\$86.0 million); one project was administered on behalf of the United States of America, amounting to US\$0.9 million (\$128.9 million); and one project was administered on behalf of the European Union, amounting to US\$55 000 (\$7.9 million).

The following two projects were approved in the amount of US\$55 000 (\$7.9 million):

- *Global Action for Healthy Lives and Well-being for All*, US\$30 000 (\$4.3 million) – to support the strengthening of multi-sectoral and multi-stakeholder governance platforms that are inclusive of marginalised voices. The project also intends to address the determinants of health in a holistic manner and to disseminate good practices, related to a priority topic for Jamaica Mental Health
- *Plan of Action for the Elimination of Cervical Cancer in Jamaica*, US\$25 500 (\$3.6 million) – to conduct a situational analysis and a National Plan of Action to guide efforts towards the elimination of cervical cancer.

The following three projects totalling US\$1.8 million (\$257.9 million) were approved and fully disbursed:

- *COPING with COVID-19 – Among Vulnerable Populations*, US\$1.3 million (\$186.3 million) – to describe the experience of the elderly, persons with disabilities and the mentally ill during the COVID-19 pandemic as well as the effects of health risk communication on them. A report on the findings was drafted for review by the relevant agencies.
- *PAHO/WHO COVID-19 Response*, US\$425 392 (\$60.9 million) – to strengthen the country's capacity for response to COVID-19, through the provision of PPE for healthcare workers; laboratory and medical

42. CICAD/SRU – CICAD supports OAS member states to strengthen their capacities to effectively disrupt the production, trafficking and distribution of illicit drugs in the region.

equipment; laptops and tablets for surveillance; and contact tracing, as well as assistance to MOHW risk communication and community engagement plan.

- *Research to support Front-of-Package Labelling (FOPL)* (June–Dec 2020), US\$15 176 (\$2.2 million)
 - to evaluate the efficacy of different FOPL schemes in Jamaica. The FOPL is a policy tool for countries to help consumers make healthier food choices. The framework manual is used to support countries to develop, implement, monitor and evaluate an appropriate FOPL system.

The **United Nations Programme on HIV and AIDS (UNAIDS)** had a portfolio of 11 national initiatives amounting to US\$0.7 million (\$100.3 million), of which eight initiatives totalling US\$326 156 (\$46.7 million) were approved. The portfolio was concentrated on the Social Infrastructure Sector, in areas such as: elimination of stigma and discrimination; support to key and vulnerable populations; prevention and treatment of HIV/AIDS; and initiatives to assist Jamaica's response to and recovery from the COVID-19 pandemic. Disbursements totalled US\$343 590 (\$49.2 million). The programmes covered activities to reduce socio-cultural, political and other barriers in healthcare, education and community settings that impact the achievement of the 95-95-95⁴³ targets to be met by 2030.

The Government was assisted with the drafting of key supporting documents for the National HIV Programme: the National HIV Strategic Plan, the concept note for the new cycle of Global Fund's support (2022–2024), and the Transition and Sustainability Plan, prepared in anticipation of the phasing out of the Global Fund's support to the country. Additionally, UNAIDS assisted with the completion of the revised HIV estimates, the stigma index 2.0 study⁴⁴ and the annual Global AIDs Monitoring Report.

UNAIDS also supported the Kingston and St Andrew Municipal Corporation (KSAMC) with a project to provide rapid scale-up and implementation of evidenced-based interventions and resource allocation, that are aimed at contributing to the reduction of HIV infections and deaths in Kingston.

The **United Nations Development Programme (UNDP)** portfolio supported six projects with combined funding of US\$2.2 million (\$315.2 million). A total of US\$329 053 (\$47.1 million) was disbursed. Three projects were administered on behalf of the Global Environment Facility (GEF), totalling US\$10.3 million (\$1.5 billion),

of which US\$393 560 (\$56.4 million) was disbursed. Two projects were administered on behalf of Global Affairs Canada, totalling US\$16.6 million (\$2.4 billion), two on behalf of the European Union, totalling US\$2.2 million (\$315.2 million) and one project was administered on behalf of Japan, totalling US\$0.6 million (\$86.0 million).

The sectoral allocation for the portfolio was Environment and Climate Change, US\$1.3 million (\$186.3 million), and Social Infrastructure, US\$0.9 million (\$114.6 million). Specific projects were implemented in relation to youth empowerment, biodiversity, gender mainstreaming, human trafficking, renewable energy and the COVID-19 response.

Funding of US\$0.7 million (\$100.3 million) was approved for the following two projects:

- *Advancing Jamaica's Digital Response to COVID-19*, US\$350 000 (\$50.1 million) – to evaluate and improve the Emergency Response Coordination Platform⁴⁵, which strengthened the Government's capacity to coordinate the flow of official development assistance for COVID-19.
- *Amplifying Youth Voices and Action*, US\$320 000 (\$45.8 million) – to empower at risk youth to actively participate in Jamaica's citizen security, governance and policy making mechanisms.

The following two projects were approved under the GEF to be administered by the UNDP:

- *Conserving Biodiversity and Reducing Land Degradation using an Integrated Approach*, US\$6.3 million (\$902.6 million): to enhance conservation of biodiversity and ecosystem practices for mainstreaming into policies and practices related to Jamaica's productive landscapes and key sectors.
- *Fourth National Communication & Biennial Update Report*, US\$0.8 million (\$114.6 million) – to enable Jamaica to fulfil its commitments under the United Nations Framework Convention on Climate Change (UNFCCC) and prepare and submit the Second Biennial Update Report (2BUR) and Fourth National Communication (4NC) to the Conference of Parties of the UNFCCC. It will also assist in building national capacities to fulfil Jamaica's commitments under the Convention on a continuous basis, while increasing the awareness of policy-makers and other stakeholders.

The portfolios of the **United Nations Educational,**

43. The 95-95-95 strategy announced by UNAIDS in 2014, is aimed at ending the AIDS epidemic by 2030 by achieving 95.0 per cent diagnosed among all people living with HIV (PLHIV), 95.0 per cent on antiretroviral therapy (ART) among diagnosed, and 95.0 per cent virally suppressed (VS) among treated.

44. The People Living with AIDS.

45. It is also known as the External Support Coordination Platform

Scientific and Cultural Organization (UNESCO) approved and fully disbursed US\$70 625 (\$10.1 million) to support the Social Infrastructure Sector. The three projects were as follows:

- *Empowerment of At-Risk Youth project*, US\$15 000 (\$2.1 million) – to improve the academic performance of children and youth and to train teenage mothers in skills that contribute to their self-sufficiency.
- *Jamaica Microscience Booklet project*, US\$22 000 (\$3.2 million) – to produce booklets on Jamaica’s experience using the micro-science kits previously provided to the science departments of selected schools.
- *UNESCO Convention on the means of prohibiting and preventing the illicit import and export and transfer of ownership of cultural property; and the International Institute for the Unification of Private Law (UNIDROIT) convention on stolen or illegally exported cultural objects workshop* (February 2020), US\$33 625 (\$4.8 million) – to equip government and non-government stakeholders to protect cultural properties and to make stakeholders aware of the UNIDROIT Convention⁴⁶ on Illegally Acquired Cultural Properties.

Jamaica also benefited from seven regional projects totalling US\$0.7 million (\$100.3 million) in the areas of climate change resilience and education, among others.

The cooperation with the **UN Environment Programme (UNEP)** comprised four national projects totalling US\$3.8 million (\$544.4 million). The total portfolio was solely for the Environment and Climate Change sector to support areas including: energy efficiency and renewable energy; reduction and management of plastic marine litter from land-based activities; wastewater management; and biodiversity. A total of US\$176 515 (\$25.3 million) was disbursed, representing a decrease of US\$1.0 million (\$143.3 million) compared with the previous year. This decrease was due to the completion of one project in the amount of US\$2.4 million (\$343.8 million).

Promoting Energy Efficiency and Renewable Energy in Buildings in Jamaica (2013–2020) in the amount of US\$2.4 million (\$343.8 million) ended. The following were accomplished:

- construction of a fully equipped energy efficient prototype or smart building on The University of the West Indies, Mona campus to foster the adoption of energy efficient techniques in building policies and practices in Jamaica and the region
- retrofitting of buildings at the National Housing Trust

(NHT) headquarters, Kingston, to improve the energy efficiency of existing buildings

- conducting of an energy audit at the NHT
- installation of a solar PV system and solar window film upgrade at the NHT.

The cooperation programme with the **United Nations Children’s Fund (UNICEF)** totalled US\$3.8 million (\$544.4 million), to support 29 initiatives in the Social Infrastructure sector, under the thematic areas of Safety and Justice, Lifelong Learning, Health Promotion and Child Rights Monitoring and Multidimensional Poverty. Among the specific interventions undertaken were building of parenting skills; registration of disabled children in the education system and other Government Support systems; psychosocial support; Treatment, Care and Support for HIV positive adolescent mothers; and increasing of national capacities to respond to crime and violence. Disbursements totalled US\$1.3 million (\$186.3 million).

The following new initiatives totalling US\$307 810 (\$44.1 million) were approved:

- *Public Expenditure Review – Education Sector*, US\$70 000 (\$10.0 million) – to assess the knowledge of learning outcomes in Jamaica; the efficiency of public spending and resource allocation in the education sector; and recent and ongoing reforms, benchmarking these against global evidence and best practice
- *National Study on the Opportunities and Risks of Children’s Internet Use (Kids Online Research)*, US\$66 308 (\$9.5 million) – to support the gathering of up-to-date national level data on the extent to which the use of the internet amplifies the risks of harm to children, and on measures to optimize digital opportunities that contribute to children’s well-being
- *Evaluation of Child Protection*, US\$77 569 (\$11.1 million) – to, *inter alia*, review the roles and responsibilities of the child protection agencies; assess the legal and regulatory framework for child protection mechanisms; and assess the adequacy of existing networking and coordinating structures among the various sub-sectors
- *Support to Dengue Prevention*, US\$19 947 (\$2.9 million) – preparation of a comic book comprising child-friendly dengue prevention material focusing on the prevention, symptoms and treatment for Dengue Fever. The material was disseminated to approximately 140 000 adults and children and viewed more than 300 000 times online
- *Prevention of Non-communicable Diseases (NCDs) among Pre-Adolescents and Adolescents*, US\$73 986 (\$10.6

46. The Convention seeks to fight the illicit trafficking of cultural property by modifying the buyer’s behaviour, obliging him/her to check the legitimacy of his/her purchase.

million): to support “Jamaica Moves in Schools” to promote healthy lifestyles for children and adolescents and to prevent NCDs.

UNICEF’s COVID-19 Response, totalled US\$0.6 million (\$86.0 million), was allocated and fully disbursed for activities including:

- Conducting a household study, involving 500 households aimed at capturing information on economic, learning and health care issues in the context of the pandemic
- Provision of support to the Social Protection Programme through the Ministry of Labour and Social Security which included cash assistance to 2 756 households with pregnant and lactating women and/or children with disabilities
- In collaboration with the FAO, provision of agricultural produce and hygiene supplies for approximately 1 000 beneficiaries registered on PATH and with the Jamaica Council for Persons with Disabilities as well as with the Early Childhood Stimulation Programme
- Provision of PPE, sanitation and health supplies to four juvenile correctional centres, benefiting approximately 180 boys and girls and their caregivers, as well as to 1 745 children and caregivers in children’s homes under the Child Protection and Family Services Agency
- Implementation of remote psychosocial support interventions, involving 400 adolescent mothers, to address COVID-19 stressors
- Donating of Play and Learn kits to 1 100 children under age six, tablets to over 500 children with disabilities, and 750 care packages to the targeted families
- Provision of parenting support via 36 help lines across 14 parishes
- Provision of information on mechanisms for support to victims of Gender-based Violence (GBV) or persons at risk of GBV.

The projects which ended included:

- The *Edusport Programme*, (2017–2020), US\$355 785 (\$51.0 million) – to support the improvement of life skills among primary school children, improve the access of girls in rural St Elizabeth to gender sensitive extra-curricular activities and increase opportunities for imaginative play for young children and parents. A Memorandum of Understanding between the implementing organisation, Breds⁴⁷ and the Ministry of Education Youth and Information, facilitated the upscaling of the project to include 25 000 students from 100 primary schools participating in face-to-face and virtual Edusport activities.

- *Securing the Best Interests of the Child: Legislative and Policy Reform for Child Safety and Justice* (2017–2020) US\$228 442 (\$32.7 million) – focused on particular safety and justice outcomes for children, with emphasis on children in alternative care and in conflict with the law and who are especially vulnerable. The main outputs included a briefing document/advocacy tool outlining core legislative gaps and recommending key reforms.
- The *ECD Support Project*, (2019–2020), US\$205 207 (\$29.4 million) comprised *inter alia*: training for 95 senior early childhood officers and 101 practitioners on the IRIE Classroom Toolkit (ICT) methodology; the training of 105 early childhood staff, provision of adaptive materials to 74 day-care centres classified as Brain Building Centres; the training of Early Childhood Institution Practitioners in mixed ability and early stimulation-based teaching and learning to enable them to better support the enrolment of children with disabilities at an early age; launching and dissemination of a research which mapped services for children with congenital malformations; and the preparation a child development checklist to accompany the Child Health Development Passport. Registration opened for the first cohort of the UNICEF developed free-to-access, early childhood special needs course, with instructions on how to make inclusive teaching materials. The aligned Associates Degree course in Child Development Therapy at the UWI, Mona, was also converted to an online modality to be made available in 2021.
- *There is an “I Can” in every Jamaican*, (2016–2020), US\$66 372 (\$9.5 million) – supported Special Olympics Jamaica (SOJ) to strengthen the network of caregivers, coaches, parents and athletes and people with intellectual disabilities. Achievements included: purchasing of four accessible Imagination Playgrounds; purchasing of synthetic turf grass for the playgrounds; and conducting Special Olympics training for football coaches from Jamaica and other Caribbean territories.

The **United Nations Population Fund (UNFPA)** allocated and fully disbursed US\$204 328 (\$29.3 million) to support initiatives under the thematic areas of – Sexual Reproductive Health (SRH), Adolescents and Youth, Gender Equality and Women’s Empowerment and Population and Development. The programme focused on the Social Infrastructure sector, supporting projects to strengthen the capacity of adolescents and youth to advocate for the services related to SRH, as well as to strengthen the legal and protection systems. It also aimed to enhance national coordination and capacity, to

47. This is a Community Based Organization

collect, analyze and utilize data and evidence for policies, programmes and achievements of the SDGs.

A report on the legislative review of the international obligations and national laws related to Sexual Reproductive Health was completed, and proposals made to national and regional stakeholders regarding the advancing of the recommendations.

In response to the COVID-19 pandemic, UNFPA undertook the following:

- An assessment of Regional Health Centres (RHCs) was conducted to analyze their maturity and identify strengths, weaknesses, threats and opportunities. The assessment examined the extent to which the COVID-19 pandemic is adversely affecting food and other basic supplies, as well as its effect on key SRH indicators.
- The Caribbean Regional Midwives Association (CRMA) benefited from capacity building around infection control measures, as well as from training on guidelines related to COVID-19 and maternal care. CRMA was also supported with the production of relevant materials and webinars on the impact of COVID 19 on maternal care.
- The Government, as well as Civil Society Organizations, were supported in their efforts to promote the continuity of essential GBV services, including the scaling up of hotlines and tele-counselling services for GBV survivors and provision of PPEs for the continuation of face-to-face services.

An initiative to enhance national coordination and capacity to collect, analyze and utilize data and evidence for policies, US\$37 500 (\$5.4 million): provided technical support to the Statistical Institute of Jamaica (STATIN) with the preparation for the 2022 Population and Housing Census. The operation plan, calendars of activities and field operations plan were among the documents revised. The manual and computer data processing plans were completed. STATIN was also supported in the review of a set of identified census documents, including: Administrative Guidelines; Questionnaire and related forms; Training Manual and Enumerators and Supervisors Manuals and C-coding and editing instructions. In addition, UWI was engaged to prepare a Literature Review on Data Appreciation.

OUTLOOK

In keeping with the medium term strategic priorities of the GOJ, support from the International Development Partners (IDPs) is expected in areas such as health; education; public financial management; social protection; justice; citizen security; digitalization; environment and climate change resilience, disaster risk financing,

agriculture; as well as rural development. ODA in response to the COVID-19 pandemic is anticipated to continue to assist the Government to recover sustainably and with greater resilience. In this regard, support is expected to strengthen the health system, control the transmission of the virus and promote a strong and better economic recovery, among other things.

In response to the public health crisis and economic recession due to the COVID-19 pandemic, the IDB and World Bank will provide concessionary loans through budget support financing. Among other things, support will facilitate the provision of emergency financial assistance in the form of cash grants to affected individuals, particularly those in the social safety net, and businesses, particularly in the tourism and agriculture sectors. The financing will also facilitate the implementation of measures to assist education initiatives to transfer from face-to-face teaching to on-line teaching.

The UN Country Team, through the *Socio-Economic Response and Recovery Project*, is anticipated to provide support to address a wide range of development issues arising from the various impacts of the pandemic. This assistance will enable the Government to leverage the opportunity to address fragilities and structural weaknesses exposed by the pandemic. Additionally, the UN SDG Fund will support the GOJ in the implementation of result-based budgeting, as well as institutional strengthening.

The **health sector** will benefit from a donation of vaccines from the Government of India to support the implementation of Jamaica's COVID-19 vaccination strategy. Assistance from the Government of Canada is also anticipated in the area of sexual reproductive health and reproductive rights.

Resources will also support initiatives aligned with Jamaica's **Social Protection Strategy and Poverty Reduction Programme**. The CDB intends to commence the development of the Country Policy Framework for the Basic Needs Trust Fund (BNTF) 10. The BNTF addresses poverty reduction by providing access for the most vulnerable communities to basic public services.

Support to **citizen security and justice** is anticipated from the Global Affairs Canada, the USAID and the United Kingdom in the form of grant resources. Support from Canada intends to enhance social justice services through institutional strengthening and capacity building as well as improving ICT infrastructure, systems and products. The USAID's support will focus on enhancing citizen security by improving police-youth relations as well as encouraging tolerance, appreciation of the law, and behaviour that reduces violence and promotes community safety.

Digitalization transformation is intended to be a strategic focus with great importance on connectivity and accessibility. Planned support from the EU and IDB is expected to

contribute to the development of Jamaica's digitalization programme.

Improving **environment and climate change resilience** will continue with support from the EU and UN Agencies. The UNDP will support the country in meeting its international obligations under the Montreal Protocol on Substances that Deplete the Ozone Layer and the Vienna Convention for the Protection of the Ozone Layer. The Joint UNOPS/UN Women project *Strengthening Women's Economic Resilience* will assist the Government to engage in evidence-based programming, targeting women and girls as well as at-risk youth for climate smart projects. Additionally, the UNDP is expected to provide assistance through the *Supporting Sustainable Transportation through the shift to Electric Mobility in Jamaica Project*, which intends to enable the demonstration of electric vehicles in Jamaica to determine the technical and economic feasibility and collect operational experiences for future upscaling.

The USAID will support the area of **disaster risk finance** through an initiative that aims to improve Jamaica's public financial risk management framework in order to mitigate the financial risks that disasters pose.

It is anticipated that that the IDB's investment financing will focus on boosting the **agriculture sector** through the Modernization of the Agriculture Sector Programme (MASP). The MASP intends to increase agricultural

productivity and income for small farmers by improving plant health services, enhancing food safety services; and implementing Public Private Partnerships to improve local and export market linkages.

Grant resources from the Government of India will support **rural development** in the form of infrastructure development and socioeconomic interventions in selected rural communities using an integrated development approach.

New country strategies are anticipated for the World Bank and IDB. The GOJ and EU is also expected to finalize the Multi-annual Indicative Programme 2021–2027 which will be funded under the Neighbourhood, Development and International Cooperation Instrument.

The new UN programming cycle will commence at the regional and national levels. Regionally, the United Nations Multi-Country Sustainable Development Framework is expected to be completed and will define how the UN Agencies will collaborate within the strategic framework, based on their comparative advantages, to support countries of the Caribbean. This includes the development of country programme documents for UNICEF, UNDP, UNFPA, UN Women and the Global Fund to Fight AIDS, Tuberculosis and Malaria, covering the programming period 2022–2026. ■

SUSTAINABLE DEVELOPMENT

INTRODUCTION

Priority actions for sustainable development (SD)¹ at the national level were advanced within the frameworks of Vision 2030 Jamaica – National Development Plan, the Medium-Term Socio-Economic Policy Framework (MTF) 2018–2021, the 2030 Agenda for Sustainable Development; the SAMOA Pathway;² and related multilateral environmental agreements. As such, emphasis was placed on strengthening the policy and regulatory framework for climate change and environmental management; building resilience in the built and natural environment; improving the quality and availability of climate data and information; improving national and local sustainable development planning; geospatial data management; capacity building and raising awareness.

Notable activities and achievements in SD included:

- Infrastructure development and upgrade at the community and national levels, viz:
 - The construction of a new weather radar tower and refurbishing of the radar station in preparation for the installation of a new Doppler Weather Radar in Coopers Hill, St Andrew
 - Installation of 20 soil moisture probes islandwide
 - Upgrading and modernisation of the hydro-meteorological network
 - Community-based climate change adaptation and resilience building initiatives, particularly in the Upper Rio-Minho Watershed Management Area, such as construction of 1 800 MICRO check dams, establishment of five aquaponics farms and construction of three communal greenhouses.
- Policy, regulatory, research and planning advancement through:
 - Preparation and submission of Jamaica’s Updated Nationally Determined Contribution (NDC) to the United Nations Framework Convention on Climate Change (UNFCCC). The NDC reflects increased greenhouse gas (GHG) emissions reduction targets, particularly from the energy and land use change/forest sectors and is in keeping with obligations under the Paris Agreement
 - the conduct of a Vulnerability Assessment of the health sector to identify and cost physical and procedural measures necessary for resilience in the sector
 - Amendments to the Registration of Titles, Cadastral Mapping and Tenure Classification (Special Provisions) (Amendment) Act, 2020 and the Registration of Titles (Amendment) Act, 2020 to facilitate improved land registration
 - The tabling of the Beach Access and Management Policy for Jamaica and the Biosafety Policy of Jamaica in the Houses of Parliament as Green Papers towards the regulation of public access to the island’s beaches and the safe management of living modified organisms, respectively
 - Development of a Disaster Risk Management and Climate Change Adaptation Plan for Annotto Bay and surrounding communities in St Mary.
 - Completion of a Draft National Spatial Plan incorporating the findings of seven Technical Papers, which were finalized in 2019.
- Preparation of knowledge products and tools, namely:
 - Training manuals to conduct vulnerability assessments and soil moisture analysis

1. SD encompasses economic, social, and environmental dimensions of development; however, this chapter focuses primarily on the environment and related aspects. The economic and social issues are addressed in other chapters.

2. The Small Island Developing States Accelerated Modalities of Action Pathway (SAMOA Pathway) is the dedicated, internationally agreed, programme of action for Small Island Developing States (SIDS) for the decade 2014 – 2024 - <http://unohrlls.org>.

- On-line Farming Support Portal - ACCEPT Agri (Agricultural Climate Change Evaluation for Production, Transformation and Resilience) developed to support assessments based on rainfall projections and provide information on crop yields for 45 different crops
 - Water Savings Calculator to estimate the volume of water saved by installing selected water-saving devices
 - GIS-based BRIMMS Bridge Inspection Application developed by the National Works Agency to streamline the data collection process for bridge inspections
 - Development of the External Support Coordination Platform to coordinate the pledges and support being received from International Development Partners at the onset of disasters.
- The use of geospatial applications to support the COVID-19 emergency response process. This included the use of GIS to aid decision-making related to the re-opening of schools for face-to-face learning and the creation of the COVID-19 Monitoring and Hospital Bed Capacity Dashboards.

The status of the environment as measured by key indicators remained varied. The health of coral reefs was rated as “poor”; beaches eroded by an average of 3.6 per cent and marine water quality was below standard. Improvements were recorded however in respect of reforestation and there was tangible improvement in environmental education supported by a raft of projects under implementation.

The overall performance of the sector was impacted by the COVID-19 pandemic as some planned activities were adversely affected. This resulted from the effect of restrictive protocols, curtailment in movement, temporary closure of offices and borders, as well as a reduction in revenues and reformulation of the budget. It was further exacerbated by the effects of an above-normal (very active) hurricane season following a period of drought. Intense rainfall associated with Tropical Storms Zeta and Eta in October and November, respectively, resulted in damage to the transportation infrastructure and agriculture sector estimated at \$6.7 billion. Two lives were lost as a result of the storms and the livelihoods of almost 15 000 crop and livestock farmers were disrupted.

GLOBAL REVIEW OF SUSTAINABLE DEVELOPMENT

International Climate Agenda

The international climate change calendar of events, including the United Nations Framework Convention on Climate Change (UNFCCC) 26th meeting of the Conference of the Parties (COP 26) was disrupted by the COVID-19 pandemic. This led to the postponement of a number of meetings. However, there were informal sessions that facilitated dialogue on selected climate change issues. In December, the United Nations, along with the United Kingdom and France and in partnership with Italy and Chile, hosted the Climate Ambition Summit 2020 (CAS 2020) virtually. Key outcomes of CAS 2020 included:

- commitments made by world leaders to increase emissions reduction targets by strengthening national climate plans (Nationally Determined Contributions). Seventy-one countries representing approximately 65.0 per cent of global CO₂ emissions and around 70.0 per cent of the world’s economy committed to reaching net zero emissions or carbon neutrality by early 2021
- launch of the Race to Resilience—a new global campaign—aimed at reducing climate change risks posed to 4.0 billion vulnerable persons by 2030
- mobilisation of US\$116.0 million in new pledges to support the work of the Adaptation Fund³.

The Prime Minister of Jamaica addressed CAS 2020 and indicated the country’s continued commitment to climate action through the Updated Nationally Determined Contribution (NDC) which targets increased ambition in the use of renewable energy and energy efficiency systems and enhanced sinks in the forestry and land use sector. He outlined plans to update Jamaica’s Climate Change Policy Framework, complete a National Adaptation Plan, as well as a Long term Low Carbon and Climate Resilience Strategy towards net zero emissions by 2050 (see section on Climate).

State of the Global Climate

According to the World Meteorological Organization (WMO) provisional State of the Global Climate 2020 report, the concentrations of major greenhouse gases (GHGs) continued to increase and despite La Niña conditions, global mean temperatures were ranked amongst the warmest on record. In assessing the impact of COVID-19 restrictions on human activities and their

3. Retrieved February 22,2021: <https://www.adaptation-fund.org/adaptation-fund-raises-nearly-us-116-million-in-new-pledges-for-adaptation-action-in-most-vulnerable-countries/>

contribution to atmospheric conditions, the WMO⁴ found that the restrictions have had an impact on anthropogenic emissions and resulted in changes in the chemical composition of the atmosphere, especially in urban areas and as visible through traditional pollutants and GHGs. The report argued however, that the reduction in carbon dioxide (CO₂) emissions garnered from local and global confinement measures would not have a discernible effect on global mean atmospheric CO₂ as it would be similar to natural yearly variability of atmospheric CO₂.

Data from the National Oceanic and Atmospheric Administration (NOAA) indicated that GHG emissions continued to trend upwards with concentrations estimated at 414.01 parts per million (ppm) (see Figure 3A). This was an increase of 2.58 ppm above the previous year's final reading of 411.43 ppm⁵.

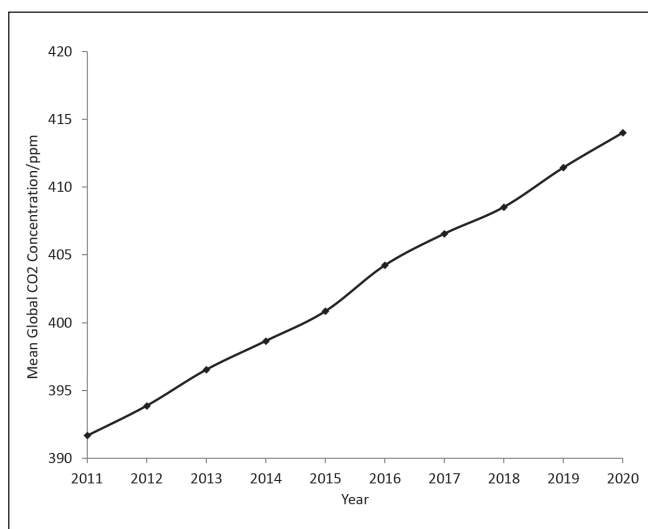


FIGURE 3A: ATMOSPHERIC CONCENTRATIONS OF CO₂, 2011–2020

The NOAA 2020 climate conditions report showed that warming of the earth's surface continued to trend upward. The average global surface temperature (land and ocean) was 14.88 °C, which was 0.98°C above the 20th century average and 0.03°C higher than the previous year. The year 2020 was the second warmest year in the 141 year (1880–2020) historical record, surpassing 2019 but being 0.02°C cooler than 2016 (14.9°C). The 10 warmest years on record

have occurred since 2005. Data from WMO concurred that the last decade (2011–2020) and five-year period (2016–2020) were the warmest on record. The global annual temperature has increased at an average rate of 0.08°C per decade since 1880 and over twice that rate (+0.18°C) since 1981.

A total of 103 named storms occurred globally, which tied the record set in 2018. The 2020 Atlantic hurricane season was extremely active with a record breaking 30 named tropical cyclones, surpassing 2005, which recorded 28 cyclones. Two of these events adversely affected the island (see section on Natural and Man-made Hazards). Of the 30 named storms, 13 became hurricanes, including 6 major hurricanes. This marked the 2nd highest number of hurricanes on record and the 5th consecutive year with an above normal Atlantic hurricane season.

SD AT THE NATIONAL LEVEL

As in previous years, Jamaica placed among countries in the High Human Development category with a ranking of 101 out of 189 countries and territories, and a Human Development Index (HDI) value of 0.734.⁶ Jamaica's HDI score was however, below the average (0.753) for the category and lower than the average (0.766) among countries in Latin America and the Caribbean. The HDI is a composite index measuring average achievement in three basic dimensions of human development—a long and healthy life, as measured by life expectancy at birth; knowledge, as measured by mean years of schooling (adults) and expected years of schooling; and a decent standard of living, as measured by Gross National Income per capita. Females continued to register better outcomes than males in two of the three. Expected years of schooling for females was 13.9 compared with 12.4 for males while Life expectancy at birth for females was 76.1 years, 3.2 more years than their male counterparts. Gross National Income per capita for males was almost 49.0 per cent higher than that for females.

An assessment of key quality of life indicators in the JSLC 2018 (latest available data) revealed that close to 85.0 per cent of the population perceived themselves to be in good or very good health, with the proportion of males holding this view (87.0 per cent) exceeding the females by 5.0 percentage points. Conversely, 23.9 per cent of

4. WMO Greenhouse Gas Bulletin (GHG Bulletin) - No. 16: The State of Greenhouse Gases in the Atmosphere Based on Global Observations through 2019 focuses on the impact of COVID-19 lockdown measures on the level of greenhouse gases in the atmosphere.
5. Revised to reflect the final reading.
6. United Nations Development Programme, Human Development Report 2020. Because national and international agencies continually improve their data series, the data, (including the HDI values and ranks) presented in the HDR2020 are not comparable to those published in earlier editions.

Jamaicans reported having at least one chronic non-communicable disease.

Living conditions remained relatively unchanged since the previous year with 75.3 per cent of households living in acceptable housing conditions as defined by the Housing Quality Index⁷. The prevalence of poverty declined by 6.7 percentage points to 12.6 per cent relative to 2017, with the largest decline registered in the Greater Kingston Metropolitan Area. There was a reduction in the overall crime rate and the number of reported crimes, although crimes against women increased in two of the 14 parishes (see chapter on National Security).

In the area of environment, the country ranked 66 (out of 180 countries) with a score of 48.2 on the 2020 Environmental Performance Index. Jamaica scored above the world and regional averages in two of the eleven areas assessed—Climate Change (65.7) and Pollution Emissions (78.6). The country, however, recorded low scores for the Fisheries (4.7) and Water Resources (3.0) indicators, a possible reflection of the continued challenges with issues of overfishing, the percentage of the population connected to sewer systems and the treatment of household wastewater. Performance in other key indicators of sustainable development is further illustrated in Table 3.1.

TABLE 3.1
SELECTED SUSTAINABLE DEVELOPMENT INDICATORS, 2016–2020

INDICATOR	2016	2017	2018	2019	2020
Quality of Life					
% of Households with Access to Piped Water	67.5	71.6	68.8	n/a	n/a
% of Households with no means of Excreta Disposal	0.0	0.2	0.2	n/a	n/a
% of Households Squatting in Dwelling	1.0	n/a	n/a	n/a	n/a
Housing Quality Index	73.5	75.0 ^r	75.3	n/a	n/a
Poverty and Inequality					
% Household below Poverty Line	11.6	19.3 ^r	12.6	n/a	n/a
Share of Poorest Quintile in National Consumption	6.8	6.5	6.7	n/a	n/a
Gini Coefficient	0.352	0.37822 ^r	0.361	n/a	n/a
Communication					
Fixed Telephone Penetration per 100 population	11.4	10.9	13.3	14.6	15.9 ^p
Mobile Penetration per 100 population	119.6	113.3 ^r	108.7 ^r	110.9	105.0 ^p
Internet use per 100 population	45.0	58.1	55.0 ^r	59.6 ^r	58.7 ^p
Percentage of households with access to working computers	35.0	37.7	38.4	n/a	n/a
Environmental					
Annual rate of change, Broadleaf Forest (ha) ^b	-0.2	-0.2	-0.2	-0.2	-0.2
Annual rate of change, Open Dry Forest (ha) ^b	-7.2	-7.2	-7.2	-7.2	-7.2
Energy Consumption per capita ('000 BOE)	7.8	7.4 ^r	7.9 ^r	8.2 ^r	6.7 ^p
Alternative Energy ('000 BOE)	1 189 ^r	1 569 ^r	1 576 ^r	1 786 ^r	2 595 ^p
Per Capita Domestic Water Consumption (Megalitres)	0.032	0.032	0.031	0.031	0.030 ^p
Annual Rainfall (mm)	1 720	2 154	1 575	1 401 ^r	1 734
Average Annual Temperature (°C) ^a	27.8	28.2	28.2	28.2	28.2
Population ('000)	2 721.7 ^r	2 725.9 ^r	2 731.0 ^r	2 734.1 ^r	2 735.4 ^p
Per Capita Waste Generation (kg/day)	n/a	1.0	1.0	1.0	1.0

a – average of temperatures for two main international airports

b – figures based on latest land use assessment survey conducted by the Forest Department in 2013

c – figures based on the latest waste characterization exercise conducted by the NSWMA in 2017

n/a – not available

p – preliminary

r – revised

BOE: Barrel of Oil Equivalent

Source: Compiled from Jamaica Survey of Living Conditions, Economic and Social Survey Jamaica (various issues), and reporting agencies

7. Housing Quality Index (HQI) is a composite indicator generated from the mean of the individual scores of selected variables namely: Walls of Block & Steel; Indoor Tap/Pipe as Main Source of Drinking Water; Electricity for Lighting; Exclusive Use of Water Closet; Exclusive Use of Kitchen; and Number of Persons per Habitable Room.

Planning and Policy Development and Legislative Framework

Activities to strengthen the governance framework for environmental management and climate change were advanced through the submission of a number of policies and plans to Cabinet. These included:

- **The Beach Access and Management Policy for Jamaica** – tabled in The Houses of Parliament as a Green Paper in November 2020. The policy sets out, inter alia, the approach to access to public and private beaches as well as their management and regulation.
- **The Biosafety Policy of Jamaica** – approved by Cabinet as a Green Paper and tabled in Parliament in June. The policy provides for the regulation of living modified organism including their safe handling, transport and use in the country.
- **The Emissions Policy Framework for Jamaica** – crafted to reduce emissions from key pollutant sources in an effort to maintain good air quality. The draft policy was finalized and submitted to Cabinet for approval as a Green Paper by the Ministry of Housing Urban Renewal, Environment and Climate Change (MHURECC).
- **The Draft Climate Change Policy Framework (CCPF), 2020** – finalized and submitted to Cabinet for approval as a Green Paper. It represents an update of the CCPF, 2015 to facilitate alignment with the provisions of the Paris Agreement as well as developments in the international climate change arena.
- **National Policy for the Environmentally Sound Management of Hazardous Wastes** – submitted to Cabinet for approval as a White Paper⁸ by MHURECC. The policy framework focuses on the effective management of hazardous waste to ensure the continued protection of the country's natural resources through pollution and environmental damage prevention.

Drafting instructions for the preparation of, and amendment to a number of Acts related to the environment were submitted to the Chief Parliamentary Counsel (CPC). These included:

- **The Forest Act, 1996 and Forest Regulations, 2001** – being amended to include inter alia, the promotion of conservation and sustainable use of forests, mechanisms to include the private sector in forestry, and strategies to ensure compliance and enforcement.
- **Wild Life Protection Act, 1945 (last amended 1991)** – being amended to address the illegal trade in wildlife, enforcement, and other legal issues as well as the

requirements for Jamaica's ratification of the Protocol Concerning Specially Protected Areas of Wildlife (SPAW Protocol).

The thrust to improve the land registration process, was boosted with approval being granted by Cabinet for amendments to the **Registration of Titles, Cadastral Mapping and Tenure Classification (Special Provisions) (Amendment) Act, 2020 and the Registration of Titles (Amendment) Act, 2020**. The amendments support greater use of adjudication as a means of proving occupation and possession of land, and will separate the issuing of titles from the processes of planning and subdivision approval.

Under the Electronic Land Titling System Project, Cabinet approved updates to: **The Registration (Strata Titles) Act, 2009; The Stamp Duty (Amendment) Act, 2017; The Transfer Tax Amendment Act, 2014; The Land Surveyors Act, 2005; and the Legal Profession Act, 2013**.

The DRM framework at the parish level was strengthened by the completion of the **Strengthening the Disaster Risk Management Capacity of the Portmore Municipal Council Project**. Among the achievements of the project in the period under review were the completion of the Portmore DRM Plan, Evacuation Plans, conduct of an evacuation drill, completion of 10 community DRM plans and the implementation of a DRM public education and awareness programme. In addition, 10 Community Emergency Response Teams were trained in rapid damage assessment, search and rescue operations, first aid, and shelter management.

The 2009 Fire Cover Review was revised by the Jamaica Fire Brigade to guide the expansion of fire services across the island for the next five years.

Financing For SD

For the financial year 2020/2021, budgetary allocation for selected thematic areas under sustainable development totalled \$18.3 billion, a 9.6 per cent decrease compared with the previous year (Table 3.2). This allocation accounted for 2.2 per cent of the total budget. The decline in funding for SD covered both the capital and recurrent programmes and was attributable largely to the prioritisation of allocation for COVID-19 response and social support initiatives as well as a decline in government revenues. The largest decrease (25.4 per cent) was observed in the Environmental Protection and Conservation category, with reductions affecting both recurrent and capital programmes. Similar to the previous year, the fire protection category accounted for the largest share (40.0 per cent), despite a 13.3 per cent decrease in budgetary allocations attributed primarily to reduced provisions for capital goods.

8. Final policy document

TABLE 3.2
BUDGETARY ALLOCATIONS FOR SELECTED ENVIRONMENTAL MANAGEMENT AND RELATED PROGRAMMES, FY
2019/20 – 2020/21

Thematic Areas	Provisional Estimates 2019/20 \$'000			Revised Estimates 2020/21 \$'000			Percentage change
	RECURRENT	CAPITAL	TOTAL	RECURRENT	CAPITAL	TOTAL	
Environmental Protection and Conservation ^a	1 704 839.0	1 182 072.0	2 886 911.0	1 399 429.0	724 677.0	2 153 910.0	-25.4
Waste Management	2 741 508.0	320 000.0	3 061 508.0	2 716 136.0	230 739.0	2 946 875.0	-3.7
Forestry	1 078 318.0	0.0	1 078 318.0	1 025 527.0	0.0	1 025 527.0	-4.9
Disaster Management ^b	1 536 738.0	69 256.0	1 605 994.0	1 407 090.0	134 504.0	1 541 594.0	-4.0
Fire Protection	6 853 009.0	1 575 000.0	8 428 009.0	7 215 133.0	91 862.0	7 306 995.0	-13.3
Land Resources Management ^c	2 589 707.0	372 000.0	2 961 707.0	2 355 930.0	638 159.0	2 994 089.0	1.1
Water Resources Management	249 517.0	655.0	250 172.0	366 619.0		366 619.0	46.5
Total	16 753 636.0	3 518 983.0	20 272 619.0	16 485 864.0	1 819 941.0	18 335 609.0	-9.6

a – Environmental Protection and Conservation reflects allocations to the National Environment and Planning Agency, and environmental management and meteorological services under the Ministry of Economic Growth and Job Creation, Ministry of Housing, Urban Renewal, Environment and Climate Change, Ministry of Industry, Commerce, Agriculture and Fisheries and the Ministry of Local Government and Community Development

b – Disaster Management reflects allocations to the Office of Disaster Preparedness and Emergency Management; disaster management for flood mitigation including road repairs and river training; Emergency Management of the Ministry of Health

c – Land Resources Management reflects allocations for Land-use Planning and Development (including Squatter Management); Rural Development (survey, land administration, settlement and land reform)

Source: Estimates of Expenditure as presented February 18, 2021

Compared with 2019, allocations for recurrent expenditure related to land resources decreased by 9.0 per cent. The overall decline was moderated by increased provisions (71.5 per cent) for the scoping phase of the Next City Project and the Harmony Beach Park. One programme category, water resource management, registered an increase of 46.5 per cent.

Catastrophe Risk Financing

In addition to the budgetary allocation for general disaster management indicated in Table 3.2, the country continued to pursue risk-financing measures as a part of the general risk management strategy. In this regard, the Ministry of Finance and the Public Service purchased US\$238.7 million worth of insurance coverage for damage and losses related to hurricanes, earthquakes and excess rainfall under the Parametric Insurance Policy with the Caribbean Catastrophe Risk Insurance Facility Segregated Portfolio Company (CCRIF SPC).⁹ The annual peril premium was US\$2.6 million and US\$1.3 million for tropical cyclones and earthquakes, respectively, while excess rainfall coverage was purchased at a cost of US\$2.4

million. The actual premium paid was reduced by 15.0 per cent due to discounts associated with the EU Regional Resilience Facility (RETF) as well as a CCRIF discount.

Jamaica received its first pay-out from the CCRIF SPC in December 2020. The payment of US\$3.5 million (\$500.0 million) was made under the Excess Rainfall policy due to intense and prolonged rainfall associated with Tropical Cyclones Zeta and Eta, in October and November, respectively.

Climate

Data from the Meteorological Service of Jamaica (MSJ) showed that the annual rainfall for the year was 1 734 mm, an increase of 23.8 per cent compared with the previous year (1 401^{r 10}mm). This represented 97.8 per cent of the 30-year (1971-2000) accumulated mean (1 773 mm) {Figure 3B}. The average annual rainfall for the decade was below the 30-year mean, however, 2020 showed an upswing which may be attributed to precipitation brought by the above normal Atlantic hurricane season.

Annual rainfall exceeded the 30-year mean in seven parishes while the remaining parishes recorded readings

9. The CCRIF SPC is a regional catastrophe fund for 22 participating governments in the Caribbean and Central American region. It is designed to limit the financial impact of devastating hurricanes, earthquakes and excess rainfall by providing financial liquidity when a policy is triggered.

10. 2019 annual rainfall figure revised

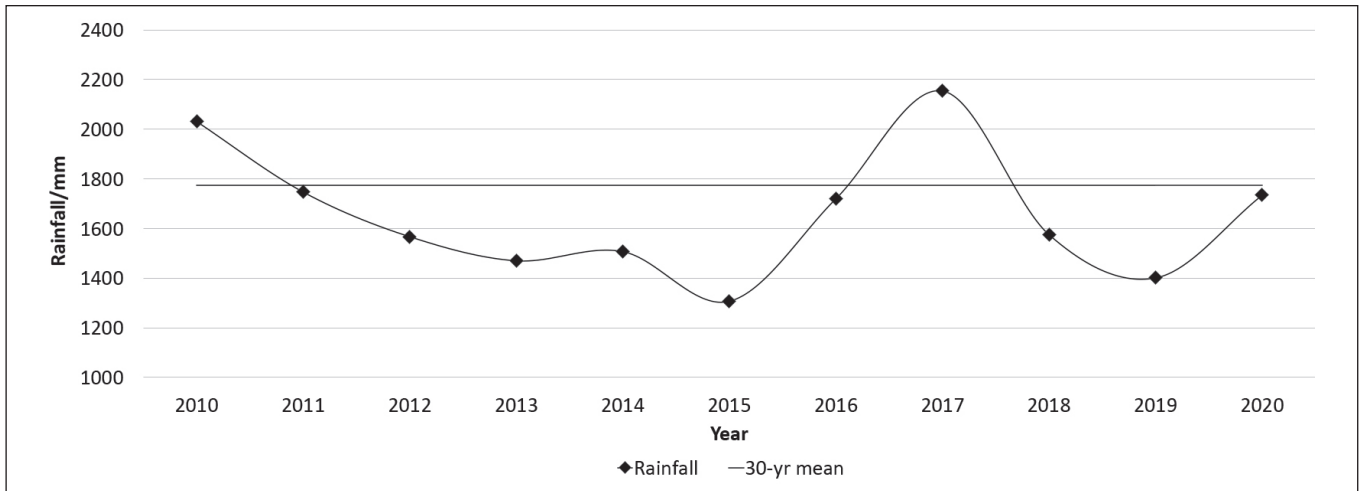


FIGURE 3B: AVERAGE ANNUAL RAINFALL 2010-2020

below average (Figure 3C). This represented a marked increase in rainfall across parishes as only one parish recorded above normal rainfall in the previous year. The largest increases were recorded in Portland (1 642 mm) and St Thomas (806 mm). Portland was the wettest parish for the year recording rainfall of 3 620 mm. Trelawny experienced the largest decline in rainfall (325 mm). Kingston and St Andrew recorded the lowest annual rainfall (1 252 mm).

The island experienced contrasting wet/dry conditions

for the year under review. Dry conditions prevailed for the first half of the year with the remainder of the year exhibiting wet conditions that resulted in flooding across several parishes. The Standardized Precipitation Index¹¹ (SPI) showed that by the March/April period, all parishes were experiencing varying degrees of dryness, with eight parishes exhibiting instances of meteorological drought.¹² Dry conditions continued in all parishes during the periods of April/May and May/June with 12 and six parishes, respectively, experiencing drought conditions. The island

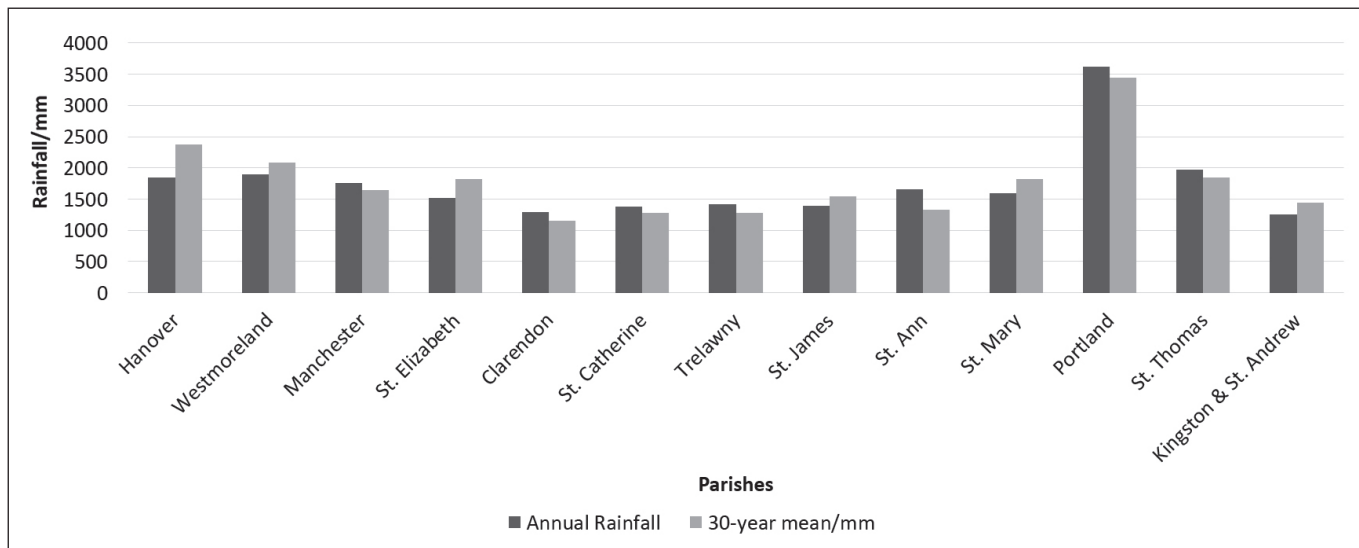


FIGURE 3C: MEAN RAINFALL BY PARISH RELATIVE TO THE 30-YEAR MEAN, 2020

11. SPI replaces the Bi-monthly Drought Index previously used as it more sensitive to the levels of dryness or wetness.

12. A meteorological drought is a period of well-below average or normal precipitation that can last from a few months to a few years. In the Caribbean region, a meteorological drought event occurs when the SPI is negative for at least two consecutive months and reaches a value of -1.30 during the wet season and -0.81 during the dry season.

TABLE 3.3
DROUGHT INDICES BY PARISH, 2020

Parishes	Dec/Jan	Jan/Feb	Feb/Mar	Mar/Apr	Apr/May	May/June	June/July	July/Aug	Aug/Sep	Sep/Oct	Oct/Nov	Nov/Dec
Kingston & St Andrew	-0.91	-1.17	-0.72	-0.88	-1.45	-0.94	-0.37	-0.06	-0.30	0.01	0.41	0.04
St Thomas	-0.31	-0.38	-0.08	-1.39	-1.82	-1.77	-0.50	0.72	0.25	1.44	2.45	1.18
Portland	-1.00	-0.38	1.05	-0.07	-2.77	-1.72	-0.06	0.77	0.26	0.88	1.40	1.27
St Mary	-0.39	0.53	0.60	-0.74	-1.98	-1.26	0.06	0.58	0.31	0.27	0.45	0.31
St Ann	-0.02	0.71	0.98	-0.23	-1.54	-1.19	0.28	0.80	0.54	0.63	1.13	1.47
Trelawny	0.38	0.39	-0.01	-0.61	-0.82	-0.53	1.47	1.84	0.41	0.27	0.54	0.33
St James	-0.19	0.06	0.16	-1.26	-1.29	-1.14	-1.23	-0.29	0.38	-0.32	0.03	0.23
Hanover	0.31	-0.79	-1.23	-1.02	-1.17	-1.48	-0.11	0.78	0.08	0.12	1.16	1.25
Westmoreland	1.00	-0.07	-0.54	-0.81	-1.17	-1.44	0.45	1.44	0.58	0.41	1.12	0.60
St Elizabeth	0.65	-0.84	-0.39	-1.75	-1.84	-0.56	0.45	0.51	0.07	0.70	1.94	1.38
Manchester	0.68	0.26	-0.51	-2.01	-2.29	-1.16	0.54	0.71	0.45	1.46	2.38	1.62
Clarendon	0.44	0.46	0.66	-0.61	-1.57	-1.40	-0.32	0.18	-0.25	1.28	2.30	1.42
St Catherine	-0.49	-1.62	-0.28	-1.15	-2.36	-1.74	-0.10	0.74	0.09	1.14	2.33	2.10
Jamaica	-1.02	-1.15	-0.65	-1.62	-2.11	-1.95	-0.67	-0.10	-0.50	-0.16	0.38	-0.08

Note: Negative figures indicate dry conditions and positive figures represent wet conditions. Categories of dryness are as follows - Near normal: 0.00 to -0.50 Abnormal -0.51 to -0.79 Moderately -0.80 to -1.29 Severely -1.30 to -1.59 Extremely -1.60 to -1.99 Exceptionally -2.00 or less. Categories of wetness - Near normal: 0.00 to 0.50 Abnormal 0.51 to 0.79 Moderately: 0.80 to 1.29 Severely 1.30 to 1.59 Extremely: 1.60 to 1.99 Exceptionally: 2.00 or more. Figures highlighted in **bold italics** indicate meteorological drought

Source: Meteorological Service Jamaica

recorded five incidents of meteorological drought ranging from moderately dry conditions to exceptionally dry conditions (Table 3.3). In July, the island received above-normal rainfall. SPI analysis showed that seven parishes experienced varying levels of dryness for the period June/July, however none experienced drought conditions.

Average annual temperature recorded at the Norman Manley International Airport (NMIA), Kingston and

Sangster International Airport (SIA), St James was 28.1°C and 28.3°C, respectively. There was an increase of 0.1°C the average temperature recorded at NMIA and a decrease of 0.1°C at SIA compared with the previous year (Figure 3D). Temperature has generally trended upward at both locations between 2011 and 2020, a trend similar to that observed at the global level (see section on State of the Global Climate).

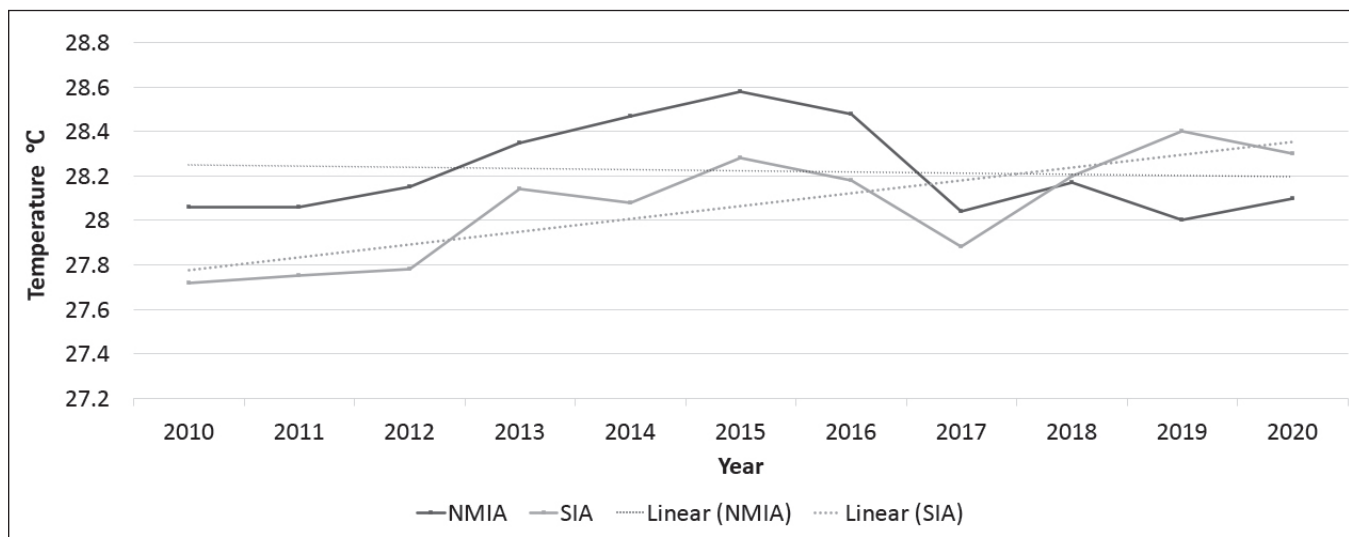


FIGURE 3D: AVERAGE ANNUAL TEMPERATURE AT THE NMIA AND SIA, 2010–2019

Programmes and Projects

Climate change programmes and projects implemented during 2020 were aligned with outcomes 11¹³ and 14¹⁴ of the Vision 2030 Jamaica – National Development Plan. The programmes and projects focused on the continued improvement of the quality of and access to climate data and information; building climate and disaster resilience at the community level; supporting initiatives for enhancing the Nationally Determined Contribution (NDC); and strengthening the policy framework for science, technology and innovation. These projects included the GOJ/Adaptation Fund Programme (GOJ/AFP), and four projects under the Pilot Programme for Climate Resilience¹⁵ (PPCR). Two new projects aimed at building the resilience and capacity of persons with disabilities also commenced under The Global Environment Facility Small Grants Programme (GEF/SGP) which portfolio focused only on environment and climate change. In addition, a €4.9 million (\$780.7 million) grant for the *A Jamaican Path from Hills to Ocean* (H20) project was approved by the EU to support increased climate resilience and protect livelihoods through the use of Integrated and Sustainable Landscape Management in selected Watershed Management Units (see chapter on Official Development Assistance).

Under the **GOJ/Adaptation Fund Programme** contracts valued at \$40.0 million and \$179.5 million were awarded for shoreline protection work at Buff Bay, Portland and Annotto Bay, St Mary, respectively. The programmed work in Buff Bay includes the construction of a composite revetment and retaining wall to reduce erosion of the shoreline and roadway and protect the coastal resources from wave energy. Activities in Annotto Bay are expected to increase protection of critical infrastructure including a heritage site from storm surge, coastal erosion and riverine flooding.

Other activities undertaken addressed reforestation, improved land and water management and disaster risk management planning included:

- procurement and distribution of 15 900 timber and fruit trees to support reforestation of the denuded slopes surrounding the town of Annotto Bay, achieving over 50.0 per cent of the targeted 30 000 trees to be planted
- the transfer of responsibility for the management, operation and maintenance of the water harvesting infrastructure and other farming assets to 12 Water

Users Groups through the signing of Custodian Agreements. The assets included reservoirs, catchment and storage tanks (both on-farm and central) as well as drip irrigation systems, which were constructed in Clarendon, St Catherine, St Mary, St Thomas, St Ann, Manchester and Trelawny

- completion of a Disaster Risk Management and Climate Change Adaptation Plan for Annotto Bay, St Mary and surrounding communities in collaboration with national and local stakeholders. These included the Office of Disaster Preparedness and Emergency Management (ODPEM), the St Mary Municipal Corporation, Annotto Bay Community Development & Environmental Benevolent Society and residents of some of the target communities, including Camberwell, Dover, Annotto Bay, Enfield and Epsom.

Activities pursued under the **Improving Climate Data and Information Management Project** continued to support the improvement of the quality and availability of climate related data and information for effective planning. They included:

- the completion of refurbishing works (valued at \$11.0 million) of the MSJ Radar Station and the installation of a weather radar tower to house the replacement Doppler Weather Radar at Coopers Hill, St Andrew. This was accompanied by the development of a training plan in radar data and products development.
- assessment of a representative sample of 15 health facilities against climate projections for the country to determine the degree to which the health sector is susceptible to the adverse effects of climate variability and change. The assessment focused on the vulnerability of the physical facilities, and established systems and procedures to adapt to different climate hazards. The vulnerability assessment identified the extent to which coping mechanisms are in place and the efficacy of such mechanisms against the projected conditions. It also proposed initiatives to build resilience and provided detailed estimates for the works.
- installation of 20 soil moisture probes at 10 locations islandwide and the development of knowledge materials for the MSJ. This was accompanied by the training of 28 public sector officers (22 males) across five hydromet and agriculture related agencies in soil moisture probe operations.

13. “A technology-enabled society”

14. “Hazard Risk Reduction and Adaptation to Climate Change.”

15. PPCR projects include the Improving Climate Data and Information Management Project, Adaptation Programme and Financing Mechanisms for the PPCR in Jamaica, Promoting Community-Based Climate Resilience in the Fisheries Sector Project and Financing Water Adaptation in Jamaica’s New Urban Housing Sector.

- implementation of real time data transmission systems for 40 Automatic Weather Stations to improve the efficiency and effectiveness of the monitoring and reporting processes of the MSJ
- fabrication and installation of 12 logger boxes to house the WRA's hydromet stations.
- the hosting of 18 community workshops in Bull Bay, Accompong, Porus, Mitchell Town, Rocky Point, New River and New Market towards the upscaling of 14 Community Disaster Risk Management Plans
- completion of the draft State of the Jamaican Climate Report 2019 containing potential indicators for assessing observed climate change impacts on key sectors (Water, Health, Tourism, Agriculture, Coastal Resources/Human Settlements and the Economy) and projections of these indicators to 2100 based on future climate change scenarios.

Work continued on building adaptive capacity of farming communities in the Upper Rio Minho Watershed Area (URMWA) of Clarendon through activities pursued under the **Adaptation Programme and Financing Mechanisms for the PPCR in Jamaica**. Activities included:

- construction of over 1 800 MICRO¹⁶ check dams in 15 communities, accompanied by training of community-based organizations, farmers and community volunteers
- establishment of five aquaponics farms in the communities of Aenon Town, Ritchie, Alston, Johns Hall and James Hill to provide alternative livelihoods for community members. This was complemented by the training of 138 community members (76 females) through eight workshops covering aquaponics technology, crop production, fish farming, post-harvest technologies, business development/entrepreneurship, quality control and marketing.
- construction of three climate-smart 6 000 ft² communal greenhouses in Bog Hole, Clarendon along with training of 26 (14 females) community members from farming groups.
- implementation of sub-projects under the Special Climate Change Adaptation Fund (SCCAF) under the Crop/Livestock Resilience & Sustainability Modelling Programme:
 - development of the On-line Farming Support Portal – ACCEPT Agri to support assessments using rainfall projections and ascertain the price of irrigation and information on how to maximize yields of 45 crops. This initiative

was a collaborative effort with the Agricultural Climate Change Evaluation for Production, Transformation and Resilience (ACCEPT Resilience) project through the Climate Studies Group Mona and the Caribbean Regional Track of the PPCR in Jamaica

- establishment of two livestock resilience projects, namely Thermal Regulation, implemented through The University on the West Indies, Mona, involving the radiative cooling of the floor of chicken coops at the Vere Technical High School, and Infrastructural Improvement for Climate Smart Goat Rearing, implemented by the Moneague College, St Ann.

- A Climate Change and COVID-19 Awareness campaign implemented in seven primary and secondary schools. Over 380 visuals aids (floor and wall signs) were distributed to these schools.

Under the **Promoting Community-Based Climate Resilience in the Fisheries Sector Project** monitoring and surveillance capacities of the National Fisheries Authority were boosted with the commissioning of a fully equipped enforcement vessel. Valued at US\$168 000.00, the vessel is to be used to combat illegal, unreported, and un-regulated (IUU) fishing practices within the coastal zone. The project also embarked on a number of preparatory and analytical studies to support implementation. These included:

- a Social Assessment of Climate Change Impacts on Gender, Youth and Labour Dynamics in the Fisheries Sector
- a study to identify sub-projects for Climate Resilient Aquaculture, Mariculture, Polyculture & Alternative Livelihoods
- designs for a climate resilient tilapia hatchery and fish farm as well as design and specifications for a demonstration mariculture facility were also completed.

The US\$4.9 million project, which was officially launched in July, is projected to benefit over 40 000 local fisheries stakeholders.

Financing Water Adaptation in Jamaica's New Urban Housing Sector (The Water Project¹⁷) hosted the Climate Innovation Challenge with 43 participants (22 females). Grants totalling over \$3.0 million were given to the winners of the challenge led by the JN Foundation. The winners were placed into incubator or accelerator programmes at the Caribbean Climate Innovation Center in St Andrew for

16. Multiple Interceptions for Climate Resilience Optimization (MICRO) check dams are about one cubic metre in size and are strategically placed to intercept the flow of water and soil on vulnerable lands, reduce soil erosion and build crop resilience.

17. The Water Project is a private sector led project under the PPCR. The implementing entity is the JN Foundation.

six months to a year to develop their innovative solutions. A Water Savings Calculator was developed under the project to estimate the volume of water saved from the use of selected water saving devices.

Other climate related activities included:

- the completion of Jamaica's Updated NDC which reflect emissions reduction targets of 25.4 per cent (unconditional) to 28.5 per cent (conditional) by 2030 (which equates to 1.8 to 2.0 MtCO₂e¹⁸), relative to the 2005 baseline.
- stakeholder consultations and other preliminary activities undertaken to inform the outputs of the 11 sub-projects under the Climate Action Enhancement Package (CAEP).
- an adaptation stocktake conducted with support from the National Adaptation Plan Global Network and the International Institute for Sustainable Development (IISD). Over 150 existing adaptation initiatives were identified at the national and local levels.
- completion of a Technology Needs Assessment for Climate Change Adaptation and Mitigation for use in the agriculture, coastal resources, water and energy sectors by the MHURECC. The project is funded by the Global Environment Facility and executed through a partnership of the UN Environment and Technical University of Denmark (UNEP DTU). Jamaica is one of five Caribbean countries benefiting from this initiative.

With respect to climate finance, the Strengthening and Country Programming Support for Jamaica Project was completed. Through a US\$300 000.00 grant under the GCF Readiness Programme the project facilitated the preparation of Jamaica's Country Programme for engagement with the GCF among other activities to strengthen the National Designated Authority (NDA). Other projects under the programme also advanced, focusing on capacity building for the private sector, supporting REDD+ Readiness for Jamaica and enhancing access to finance by civil society organisations. Additionally, Jamaica commenced preliminary activities to pilot the Local Climate Adaptive Living Facility (LoCAL). A letter of endorsement was submitted to the United Nations Capital Development Fund (UNCDF) in August and initial stakeholder engagements with Municipal Corporations (as the main beneficiaries) and other stakeholders commenced. LoCAL will, inter alia, support local level climate action through performance-based climate resilience grants.

Forest Resources

Under the National Forest Management and Conservation Plan (NFMCP), now in its 5th year of implementation, the Forestry Department (FD) committed to the reforestation of 100ha annually to support forest restoration efforts. For the review period, a total 162.2ha of denuded lands were reforested across all parishes with the exception of Kingston and St Catherine. A total of 236 793 seedlings were produced and 222 106 distributed islandwide. Maintenance of forest areas was conducted through the weeding of 458.1 ha of plantations, maintenance of 58.7km of fire lines and approximately 95.0 km of roads and trails. These efforts provided employment opportunities for 780 casual labourers (677 males, compared with 619 casual workers comprising 559 males in 2019) from communities in close proximity to forests. The works also included plantation surveying, biophysical inventory and volume assessment activities.

Through the Private Forestry Programme, which encourages land owners to plant timber trees, 211 private planters registered for the year, bringing the total number of private planters and planting sites to 5 736 and 5 769, respectively. A total of 17 967 seedlings were distributed to 451 new and existing planters; technical guidance on planting and maintenance was also provided by FD to these planters.

Enforcement activities included 3 767 patrols (115 less than the previous year) across the island resulting in 61 Notices of Contravention (14 more than the previous year) being served for offences including animal trespass, kindling of fires, illegal logging, agricultural squatting and clearing of land. A compliance rate of 82.0 per cent was realized, compared with 60.0 per cent in the previous year. Four offenders were brought before the courts and charged with offences including illegal logging, removal of forest produce and transporting a power saw and a cutlass in a forest reserve.

During the year, 33 applications for sawmill licenses were received (the same as the previous year), of which 27 were approved and issued. The moratorium placed on the issuing of new permits and licences for the sale of standing timber in 2018 remained in effect. The assessment of procedures in the Permit and Licensing system that governs the sale of timber, facilitated by the 2018 Moratorium was completed. A total of 1 472ft³ of lumber (324 ft³ Caribbean Pine, 1 148 hardwoods), valued at \$129 421.96 were seized.

The Forest Management Plan (FMP) for forest estates in Cluster 3 (Stephney-John's Vale and Environs) was approved for implementation in April while work continued on FMPs for Cluster 4 (Western Blue Mountain) and Cluster 2 (Bull Head & Environs). To date, 12 sustainable

18. Metric tonne of carbon equivalent. The previous NDC targets equated to 1.1 to 1.5 MtCO₂e.

management plans have been developed inclusive of eight forest estates, one watershed management unit and three private areas, representing 60 000ha. In addition, the FD completed a harvesting plan for estates within Cluster 3. To date four harvesting plans have been developed to guide the sustainable harvesting of timber resources.

During the period, some 3 329.4 ha of mangrove forest were assessed including an evaluation of the biophysical characteristics, health status and stresses of these ecosystems. The results are to serve as baseline data for the formulation of a National Mangrove Forest Management Plan.

Under the Support for REDD+ Readiness Preparation in Jamaica funded by the Green Climate Fund (GCF), the governance framework and roadmap were finalised, in addition, the FD's capacity to calculate carbon stock and meet UN REDD+ requirements was strengthened. The Forest Inventory Assessment (FIA) methodology and field manual were revised with assistance from the United States Forest Service (USFS), to include the collection of carbon stock monitoring information. This supported the execution of the pilot carbon assessment conducted in Bogue 2 Forest Reserve in St Ann. The total estimated carbon found in the reserve, including above and below ground counts, was 32 584.0 tonnes.

Training in forest fire prevention and management in high-risk fire prone communities close to forested areas was facilitated by the FD and the Jamaica Fire Brigade (JFB). A forest fire management manual was produced and distributed to the 78 participants from Denham Farm, Manchester and Stepney, St Ann.

Public education and awareness raising activities for sustainable forest management continued during the year with 75 school visits, 132 virtual and face-to-face expos and public awareness events. The number of events was reduced due to COVID-19. A total of 25 611 seedlings were distributed via the annual National Tree Planting Day and Labour Day initiatives, compared with 19 309 in the previous year. Since the National Tree Planting Initiative – “Three Million Trees in Three Years” – which commenced in 2019, some 294 785 seedlings have been planted by FD and 84 256 seedlings distributed to the public for individual planting.

The alternative livelihoods programme for local communities was supported by the European Union-funded Budget Support Programme for the Forest Sector (EU-BSP). Some 46 projects valued at \$240.0 million were awarded. Projects included the implementation of rainwater harvesting solutions in communities underserved by utility water, construction of community greenhouses and apiculture enterprises, cottage industries and the establishment of agroforestry acreage.

Coastal and Marine Resources

Coral reef health assessments were conducted at 22 reef sites across the island, seven sites fewer than the previous year. Some sites in the 2019 sample were not repeated in 2020 and some new sites were added. The assessment was carried out using the Coral Reef Health Index (CRHI) which is determined through the use of four indicators: coral cover, macro-algae cover, herbivorous fish abundance and commercially important fish abundance (Table 3.4). The overall average CRHI score was 2.0, a decrease from the previous year (CRHI 2.2), indicating that reefs continued to be in poor condition for the 6th consecutive year. Sites and location specific calculations showed that five sites ranked as “fair”, five sites ranked as “poor” and 12 sites ranked as “critical”. Similar to 2019, none of the reefs were ranked as “good” or “very good”. A few sites recorded improvements in overall ranking namely Dickies Reef in the White River Special Fishery Conservation Area moving from “critical” to “poor” and Sergeant Major in the Montego Bay Marine Park and Boscobel Flats in Sandals Boscobel Special Fishery Conservation Area moving from “poor” to “fair”. The most notable declines in CRHI ranking were Sewage End in the Ocho Rios Marine Park Protected Area and Round Hill both moving from “fair” to “critical”.

The average hard coral cover (HCC) ranked as “fair” with a reading of 13.45 per cent/100m², despite a decrease of 5.26 percentage points relative to 2019. In contrast to the previous year when the majority of sites were rated as “good”, 12 of 22 sites were rated as “poor”, 5 “fair”, 4 “good” and 1 “critical”. The average macro-algal coverage (nutrient indicating algae) for 2020 was 31.97 per cent/100m², falling within the “fair” rating, similar to that of the previous year; however, macro-algal cover exceeded 40.0 per cent at 11 sites (four more than 2019) (see Table 3.4)

The average biomass of herbivorous and commercial fish continued to decline with their volumes being ranked as critical. The average herbivorous biomass declined to 542.43 g/100m² from 610.07 g/100m² in the previous year. All sites assessed were ranked as critical with the exception of Monkey Island which ranked “poor” and Golden Eye Coral Garden which ranked “very good” for the herbivorous fish abundance indicator (Table 3.4). The average commercial fish abundance fell to 32.99 g/100m² from 64.66 g/100m², compared with 2019. All sites assessed were ranked as critical for the commercial fish abundance indicator.

TABLE 3.4
CORAL REEF HEALTH INDEX BY PARISH, 2020

Parish	Location	Site	HCC (%/100m ²)	NIA (%/100m ²)	Herbivorous Fish (g/100m ²)	Commercial Fish (g/100m ²)	CRHI	
Portland	East Portland Special Fishery Conservation Area	Monkey Island	9.42	19.27	1 449.17	338.94	2.3	
Kingston	Palisadoes-Port Royal Protected Area	Drunkenman's Cay	10	14	1.81	0	2.3	
		Lime Cay	8	36	8.98	0	1.8	
		South East Cay	2.21	54.1	97.7	12.16	1.5	
St Catherine	Portland Bight Protected Area	Wreck Reef	8	43	9.54	0	1.5	
		Pigeon Island West	8	26	32.75	1.59	1.8	
		Sandals Boscobel Special Fishery Conservation Area	Boscobel Flats	34	4	37.86	13.08	2.8
St Mary	Oracabessa Bay Special Fishery Conservation Area	Boscobel West	34	4	60.64	28.37	2.8	
		Commander Reef	16	43	378.71	24.14	1.8	
		Golden Eye Coral Garden	9	64	6 792.01	14.34	2.3	
St Ann	Discovery Bay	Coral Nursery	7	56	912.28	49.23	1.5	
		Gorgo City	8.31	18.96	893.54	9.45	2	
		Sewage End	25	3	0.87	0.08	1.5	
St James	Ocho Rios Marine Park Protected Area	RIU Nursery	8	53	38.16	6.12	2.8	
		Dickies Reef	14	8	66.36	13.66	2.5	
		White River Special Fishery Conservation Area	Choicy Reef	8	63	6.39	4.8	1.3
		Hermosa Cove	8	44	98.93	21.66	1.5	
		Sunset Beach Mooring	7	48	47.55	1.51	1.5	
St James	Montego Bay Marine Park	Classroom Reef	7	42	326.79	62.86	1.5	
		Sergeant Major	19	6	393.72	56.76	2.8	
		Airport Reef West	29	3	41.48	42.16	2.8	
Hanover	Hopewell	Round Hill	17	51	238.18	24.95	1.8	
Average			13.45	31.97	542.43	32.99	2.0	

CRHI: Critical: >1.0 - 1.8; Poor: > 1.9 - 2.6; Fair: >2.7 - 3.4; Good: >3.4 - 4.2; Very Good: >4.3 - 5.0

KEY

Coral Index	VERY GOOD	GOOD	FAIR	POOR	CRITICAL
Coral Cover (%)	>40	20.0 - 39.9	10.0 - 19.9	5.0 - 9.9	<5
Reef Biota Index					
NIA/Macroalgae Cover (%)	<10	10.0 - 19.9	20.0 - 39.9	40.0 - 59.9	>60
Herbivorous Fish Abundance (g/100m ²)	>4 800	3 600 - 4 799	2 400 - 3 599	1 200 - 2 399	<1 200
Commercial Fish Abundance (g/100m ²)	>2 800	2 100 - 2 799	1 400 - 2 099	700 - 1 399	<700

Source: National Environment and Planning Agency

Marine Water Quality¹⁹

Marine water quality testing was conducted at 10 focal areas across the island using four indicators: nitrates, phosphates, Biological Oxygen Demand (BOD) and faecal coliform. Nitrate levels at all locales exceeded acceptable standards (Table 3.6). The highest levels of nitrates were recorded in the Montego River (St James) and South Negril Orange River (Westmoreland) focal areas with readings of 1.02 mg/L and 0.99 mg/L, respectively. Of the samples collected, 94.8 per cent exceeded the acceptable standards for phosphate, a 13.7 per cent increase over the previous year. A site within the Montego River focal area recorded the highest level

of phosphate (3.05 mg/L), showing a marked increase relative to the highest value (0.3mg/L) recorded in the previous year. There was a 6.0 per cent increase in the samples exceeding the acceptable standards for faecal coliform. Four watersheds recorded faecal coliform levels above set standards with readings in excess of 1 600MPN/100ml—Martha Brae, Montego River, Rio Minho and Hope River. In the previous year, only one focal area, the South Negril Orange River in Westmoreland, recorded faecal coliform levels with such excess. There was an overall reduction (38.7 per cent) in the percentage of sites exceeding BOD standards while the percentage with faecal coliform exceedance remained unchanged relative to 2019 (Table

19. Tests conducted at various saltwater locations including estuaries, with fish sanctuaries, cays or at beaches.

TABLE 3.5
BEACH WIDTH ACROSS EIGHT PARISHES, 2019–2020

Parish/Locality	No. of Sites	Cumulative Mean Beach Width (m)		% Change
		2019	2020	
Portland	5	23.14	18.42	-20.4
Kingston	9	50.83	49.39	-2.8
Trelawny	2	19.98	23.45	17.4
Westmoreland (Other)	2	14.53	12.97	-10.7
Hanover/Westmoreland (Negril)	14	36.14	31.37	-13.2
Clarendon	2	28.94	29.46	1.8
St Catherine	5	37.63	39.84	5.9
St James	4	27.15	24.87	-8.4
Average		29.79	28.72	-3.6

Discrepancies are due to rounding

Source: National Environment and Planning Agency

3.6). Notwithstanding the overall improvement, the situation at the Montego River worsened as shown by an 86.4 per cent increase in BOD readings (67.30 mg/L).

TABLE 3.6
INDICATORS OF MARINE WATER QUALITY, 2020

Indicators	Standard	Sites Exceeding standard (%) 2019	Sites Exceeding standard (%) 2020	Percentage Change
Nitrates	0.007-0.014mg/L	84.6	100	18.2
Phosphates	0.001-0.003 mg/L	83.4	94.8	13.7
Biological Oxygen Demand	0.0-1.16mg/L	25.6	15.7	-38.7
Faecal Coliform	<2-13MPN/100mL	30	31.8	6.0

Source: National Environment and Planning Agency

Water Resources Management

Monitoring of the island's water resources resulted in 1 572 stream flow measurements being taken from 64 continuous recording and 67 ungauged stations across 131 rivers. Meteorological drought conditions that affected the island (see section on State of the Global Climate) resulted in below normal flows at the majority of rivers from January to June. Surface flows during the wet season of April to May were uncharacteristically low but began to improve in July.

Under the Water Resources Act, 1995, 18 applications were received for permits to drill new wells with 17 being processed. Some 198 applications for abstraction licenses (new and renewal) were received and processed, 48 more than 2019. There was a 91.0 per cent compliance rate

for the submission of abstraction data (a 3.0 percentage point increase compared with 2019) and an 83.0 per cent compliance rate for the submission of water quality data (33.0 percentage points more than 2019).

Continued improvements to the hydromet network of the WRA was evidenced by the upgrading of 12 gauging stations, and improving durability to weather/natural elements as well as expanding the real-time data platform. Three stations of the 12 upgraded gauging stations were added to WRA's real-time platform facilitating the provision of readily accessible, up-to-the-minute data.

Research activities conducted by the WRA included studies on ground water quality and aquifer protection, which were initiated at the Lower Rio Cobre Alluvium Aquifer and Essex Valley sub-WMU Limestone aquifer. The Lower Rio Cobre Alluvium study sought to determine the baseline water quality of the aquifer in light of the existence of the Aquifer Protection Zone and planned developments within St Catherine environs. The Essex Valley study provides a complementary observation of groundwater quality in the Limestone Aquifer underlying the JISCO-Alpart Alumina Refinery in Nain, St Elizabeth. Hydrological research to assess the reliability and mineral content of the Bath Mineral Spring in St Thomas and Milk River Bath mineral springs in Clarendon commenced on behalf of the Ministry of Tourism. Dye tracing injection was done at Blue River Sink, Pedro River and McDowell Spring, St Ann; Roaring River, Westmoreland; and Rio Cobre, St Catherine.

Biodiversity

Biodiversity conservation activities usually conducted by the Urban Development Corporation (UDC) and National Environment and Planning Agency (NEPA) were curtailed

due to the COVID-19 pandemic local confinement measures. The usual game bird species abundance monitoring was halted and sea turtle monitoring exercises were reduced, with the UDC not being able to conduct sea turtle surveys this year. The NEPA Game Bird Survey normally conducted February to June was cancelled. However, the existing 15-year dataset suggested that population levels were sufficient to support the annual game bird hunting season.

Reconfirmation of selected historical sea turtle nesting beaches took place through NEPA during the peak nesting season (June to November) for the Hawksbill sea turtle²⁰ (*Eretmochelys imbricata*) at 61 sites, 22 of which were found to be active compared with 63 and 21, respectively, in the previous year. At the index beach²¹ in the Palisadoes-Port Royal Protected Area, three nests and two false crawls²² were observed; one nest showed evidence of hatching success compared with 2019 in which there were six nesting, one false crawl and one nest showing signs of hatching emergence. Monitoring of sea turtles along the south coast recorded 1 354 hatchlings from 51 nests in Westmoreland and 100 nests in Manchester, compared with 601 hatchlings from 10 nests in Westmoreland and 113 nests in Manchester in 2019.

A total of 61 permits and certificates were issued by NEPA for the import and export of biological matter under the Convention on International Trade in Endangered Species (CITES), representing a 35.0 per cent decrease from the previous year. Orchid specimens and Sawn Wood (*Swietenia macrophylla*) accounted for most of the permits and certificates issued. Permits were also issued for Jamaican Iguana blood samples to undertake tests overseas.

Protected Areas

Plans implemented regarding the protection of the Great Goat Island were advanced by the UDC. These included the conduct of terrestrial baseline assessments and the establishment of an advisory committee to spearhead conservation efforts.

A recommendation for the designation of the Pedro Cays Protected Areas (PCPA) was submitted by NEPA to the Ministry of Economic Growth and Job Creation. The designation is intended to protect the natural and cultural heritage of the PCPA and provide for sustainable livelihoods.

Management of Waste, Pollution and Chemicals

Solid Waste

The total volume of solid waste collected utilizing formal systems increased by 9.7 per cent to 1 103 433 tonnes from 1 006 166 (Table 3.7). All wastesheds recorded increases in waste collection with the exception of Southern Parks & Markets. The Western Parks & Markets wasteshed accounted for the highest percentage increase (34.1 per cent). Waste generated per capita was estimated at 1.0 kg/day²³.

International Coastal Clean-up Day (ICC) activities were scaled down to comply with GOJ protocols for public gatherings and was staged between September and December. A total of 338 volunteers from 23 registered groups collected 3 628.7kg of garbage. A total of 42 907 units of the top 10 items were collected from 25 sites (land, underwater, watercraft) along 20.4km of coastline and consisted mainly of plastic beverage bottles (Table 3.8). Plastic bottles remained the number one collected item for the 13th consecutive year.

The National Solid Waste Management Authority (NSWMA) launched the **Northern Belt Plastic Project** in 16 communities across the MPM region to increase public awareness on the importance of solid waste separation and promote solid waste management best practices. Over 2 200kg of plastic was collected and handed over to a recycling company for processing.

Public education and awareness activities were conducted to promote compliance with phase two of the plastic ban. This phase, which came into effect on January 1, 2020 addressed

TABLE 3.7
VOLUME OF WASTE COLLECTED BY WASTESHED,
2019-2020

Wasteshed	Total Volume of Waste (tonnes)		Percentage Change
	2019	2020	
Metropolitan Parks & Markets	556 105	557 070	0.2
Western Parks & Markets	225 170	302 053	34.1
Southern Parks & Markets	78 239	68 134	-12.9
North-eastern Parks & Markets	146 652	176 176	20.1
Total	1 006 166	1 103 433	9.7

Source: NSWMA

20. Hawksbill sea turtles are the island's main nesting species.

21. An index beach is used to determine population trends.

22. A false crawl occurs when a female turtle prepares the substrate to lay a clutch of eggs but does not actually deposit her eggs.

23. Waste generated per capita is estimated from the last waste characterization exercise conducted by the National Solid Waste Management Authority (NSWMA) in 2017.

TABLE 3.8
TOP TEN ITEMS COLLECTED AT THE ANNUAL
COASTAL CLEAN-UP DAY, 2020

Items	Number of Items
Beverage Bottles (Plastic)	16 580
Bottle Caps (Plastic)	8 618
Plastic Pieces	3 827
Food Wrappers (Candy, Chips, etc.)	2 774
Beverage Bottles (Glass)	2 439
Cups, Plates (Plastic)	2 226
Grocery Bags (Plastic)	2 217
Bottle Caps (Metal)	1 559
Other Packaging	1 490
Beverage Cans (Metal)	1 177

Source: Jamaica Environment Trust

the manufacture, distribution and use of expanded polystyrene foam products utilized in the food and beverage industry. The authority launched a mobile application that enables users to report littering in public spaces and illegal dumping, along with tips for solid waste management.

Pollution

Reported pollution incidents fell to 32 from 55 compared with the previous year. The category “spills”²⁴ accounted for the majority of reported incidents (15) followed by oil spills (9). Other incidents of pollution included air pollution, fish kills, and sewage discharge and water pollution/fire control run off.

The phasing out of hydro-chlorofluorocarbons (HCFC) continued under the HCFC Phase out Management Plan Implementation Project with six stakeholder workshops being held during the year. Participating stakeholders represented the mobile Refrigeration and Air Condition (RAC), beverage and food preservation and hospital sub-industries.

Chemical, Hazardous and other Waste

In November, Cabinet approved the **National Programme for the environmentally sound management of end-of-life pneumatic tyres**. The programme is a collaborative effort between MHURECC, the Ministry of Local Government and Rural Development, the NSWMA and a private sector entity. The 10-year \$428.0 million project involves the removal of pneumatic tyres from the island’s disposal sites for incineration in a high temperature kiln.

A total of 3 037.85 metric tonnes of hazardous waste were generated from lead batteries and e-waste. Twelve applications were received and processed for the export of hazardous waste and 10 were approved whilst three applications for the transit of hazardous wastes were received and two approved. The permits were processed under provisions of the Basel Convention for the Transboundary Movement of Hazardous Wastes and their Disposal.

Land Resources

Development Applications and Management

A total of 1 930 applications were received by NEPA, a 5.6 per cent decline compared with 2019 (Table 3.9). The overall

TABLE 3.9
DEVELOPMENT APPLICATIONS RECEIVED AND PROCESSED, 2019-2020

Application Type	Received		Processed ^b		Processed in 90 days		Processed in 60 days		Approved ^b	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Planning	359	276	302	181	209	131	165	107	109	58
Subdivision	617	599	559	517	508	446	430	368	364	197
Environmental Permit ^a	522	561	413	312	266	232	204	154	244	176
Environmental License	459	427	399	367	281	300	228	224	179	203
Beach License	87	67	76	44	47	26	34	15	22	27
Total	2 044	1 930	1 749	1 421	1 311	1 135	1 061	868	918	661

a – Environmental permits are required for those activities that fall within stipulated categories pursuant to the Natural Resources (Prescribed Areas) (Prohibition of Categories of Enterprise, Construction and Development) Order 1996 (amended 2015) and the Natural Resources Conservation (Permits and Licences) Regulations, 1996 (amended 2015); whereas licenses are required for the construction and operation of wastewater facilities for both sewage and trade effluent and the discharge of treated effluent into the environment.

b – Applications processed and approved within the current year also include those applications that may have been submitted and received by NEPA within the previous year.

Source: NEPA

24. Includes chemicals and other substances except oil.

decline reflected decreases in all application categories, except Environmental Permits which registered a 7.5 per cent increase relative to the previous year. The most notable decreases were recorded in the categories of Planning applications (23.1 per cent) and Beach Licenses (23.0 per cent), while applications for Environmental Licenses and Subdivisions decreased by 7.0 per cent and 2.9 per cent, respectively. Notwithstanding the decrease, the categories Subdivision and Environmental Permits together, continued to account for more than a half of the applications (see Table 3.9). The number of applications processed amounted to 1 421 with 58.8 per cent of those received being processed within 90 days. At the close of the year, 661 applications had been approved. The majority (60.5 per cent) of these were for Subdivisions and Environmental Licenses.

Building/Planning Applications

Building/Planning applications submitted to municipal corporations totalled 5 305 and were in relation to eight of 10 development categories, namely: residential, commercial, industrial, institutional, resort, mixed-use, recreational, and 'other'. Most applications continued to be for residential development (89.4 per cent), followed by commercial (6.0 per cent). With the exception of the industrial, resort and mixed-use categories, applications were mainly for developments of less than 300 m.² St Catherine (14.9 per cent) and Kingston and St Andrew Municipal Corporation (KSAMC) {14.0 per cent} received the largest number of applications overall (Table 3.10).

Except for residential, institutional, and industrial applications, all development categories declined compared with the previous year. Residential applications registered a 7.1 per cent increase, with the largest share received by St Catherine (15.2 per cent) while applications for institutional development increased 8.5 per cent, with Clarendon receiving the largest share (18.0 per cent). The KSAMC continued to account for all mixed-use applications received as well as the largest share of commercial applications (21.4 per cent) and industrial applications (64.7 per cent). St James registered the most applications for resorts (42.9 per cent).

The number of applications approved decreased 4.3 per cent to 4 181 with a 90-day approval rate of 82.4 per cent. Trelawny recorded the highest rate of approval within 90 days at 99.0 per cent followed by Clarendon at 92.0 per cent. The year closed with 2 041 applications still being processed, 65.4 per cent of which were within the 90-day processing timeframe (see Table 3.10). A total of 26 applications were refused with Clarendon accounting for more than a half (57.7 per cent).

Subdivision Applications

A total of 373 Subdivision applications were received by Municipal Corporations, 29 fewer than the previous year. Almost three-quarters of these applications were for subdivisions of 'nine lots and under to less than five acres'. Similar to 2019, the largest share of applications was received by Manchester (17.4 per cent), followed by

TABLE 3.10
DEVELOPMENT APPLICATIONS RECEIVED AND PROCESSED, 2020

Local Authorities	Total Building/Planning Applications				Total Subdivision Applications			
	Received	Approved		Still being Processed	Received	Approved		Still being Processed
		Approved in 90 days	Approved ^a	Outstanding ^b		Approved in 90 days	Approved	Outstanding ^b
KSAMC	741	414	502	398	54	2	26	54
St Catherine	789	439	481	427	37	0	0	33
Portmore	615	458	597	83	0	0	0	0
Clarendon	462	388	424	100	33	1	37	57
Manchester	377	244	320	182	65	2	60	175
St Elizabeth	380	222	244	135	61	0	0	167
Westmoreland	212	156	187	95	8	0	7	118
Hanover	94	86	105	27	11	0	0	15
St James	584	429	530	128	14	2	13	28
Trelawny	158	130	131	37	20	0	0	11
St Ann	374	234	310	192	54	5	44	125
St Mary	149	69	107	85	0	0	0	0
Portland	185	91	133	104	16	7	17	38
St Thomas	185	86	110	48	0	0	0	26
Total	5 305	3 446	4 181	2 041	373	19	204	847

a – Approved applications include backlog from previous years

b – Applications being processed within and outside the 90-day timeframe

Source: Ministry of Local Government and Rural Development

TABLE 3.11
ENFORCEMENT ACTIONS FOR THE PERIOD 2018-2020

Year	Enforcement Notices (TCPA/NRCA)	Cessation Orders	Stop Notices	Notice of Intention to Suspend	Notice of Intention to Revoke	Suspension Notice	Onsite Breach/Warning Notice	Warning Letters	New Court Matters	Notices Under the AQ & WWSR ^a	Total
2018	24	16	8	0	0	0	679 ^r	418	10	1	1 156 ^r
2019 ^r	13	20	0	0	0	0	568	223	38	4	866 ^r
2020	17	42	4	5	0	0	660	592	22	6	1 348

a – Air Quality and Waste Water and Sludge Regulations

r – revised

Source: NEPA

St Elizabeth (16.4 per cent) {see Table 3.10}. Approval was granted to 204 applications and 847 were still being processed at the close of the year. Of these, 16.1 per cent were within the 90-day time frame for processing. Two applications were refused.

Estimated Value²⁵ of Development Applications

Building/planning applications received by Municipal Corporations were valued at an estimated \$204.7 billion for the year. The estimated value of applications approved was \$145.2 billion, while those that were still being processed at the close of the year were estimated at \$105.2 billion.²⁶ Subdivision applications received had an estimated value of \$3.1 billion, while those granted approval were valued at an estimated \$792 million. Subdivision applications that were still being processed at the close of the year had an estimated value of \$10.0 billion.

Enforcement

The number of enforcement actions increased by 55.7 per cent to 1 348 in 2020 (Table 3.11). Warning Letters and Onsite Breach/Warning Notices together, continued to account for more than 90.0 per cent of these actions. Onsite Breach/Warning Notices increased by 16.2 per cent while the number of Warning Letters and Cessation Orders more than doubled relative to 2019. Twenty-two new court matters were initiated for the year.

National Spatial Planning

Efforts to promote sustainable urban and rural development through spatial planning continued with the advancement of work on three national plans. These plans included:

- **Port Royal Master and Town Management Plan** – building on the previous year’s work, a US\$ 110 000.0 Living Heritage Programme was launched with support from the Inter-American Bank. The programme, which aims to strengthen cultural identity and promote sustainable urban development, is being completed in three phases. Activities include a local action framework to prepare a profile of the town; rapid diagnostics and stakeholder workshops; and preparation of a strategic plan and financing scheme. The Port Royal Master and Town Management Plan is a component of a broader “Sustainable Port Royal 2020 Project” being undertaken by the UDC to redevelop the area.
- **National Spatial Plan (NSP)** – a draft of the National Spatial Plan was completed using the data garnered from seven technical thematic papers focused on the areas of Land Resources, Coastal Resources, Marine Resources, Environmental Resources, Human, Commercial and Industrial Settlements, Public Utilities and Social Amenities. A series of consultations were held, primarily targeting stakeholders at the local government level. Work also progressed on development of the accompanying National Spatial Planning Information Technology (NSPIT) Platform (see section on Spatial Data Management).
- **Next City²⁷ Plan** – the Horizon Scanning and Foresighting Study, which is the second component of Phase 1, was completed. A final report was produced with recommendations on areas that may be considered suitable for development of the Next City.

25. An estimation of the contribution of building constructions and subdivisions to the economic/investment profile of a parish.

26. Applications still being processed at the end of the year may include some that have been carried over from the previous year.

27. Originally referred to as the Third City.

Land Divestment

Eighty-four applications were submitted for review by the Commissioner of Lands to the Land Divestment Advisory Committee. This included 81 new applications and three resubmissions. Of the total received, 80 applications valuing \$1.3 billion, were processed by the Committee and 79 recommended to the Minister for consideration. Among these were 20 submissions for regularization of illegal occupants. Approval was granted to 53 applications for the sale of land (valued at \$1.2 billion) and 26 applications for leasing of land (valued at \$10.6 million). Four applications were deferred pending submission of additional information and one was withdrawn.

Natural and Man-made Hazards

COVID-19 Pandemic

The country was impacted by a health disaster beginning March 10 when the first case of COVID-19 was identified locally. It continued and intensified up to the end of the year. In response to the outbreak and to enforce related protocols and guidelines, 28 Disaster Risk Management (DRM) Orders were issued under the Disaster Risk Management Act, 2015. The Orders comprised measures to contain the spread after the first case was identified. These included the declaration of the country as a disaster area; closure of all schools, closure of air and seaports to incoming passenger traffic; imposition of travel restrictions on selected countries; and the imposition of a Work from Home mandate for all non-essential workers in the public sector. The communities of Seven Miles and Eight Miles, Bull Bay and a section of the Corn Piece Settlement area of Hayes, Clarendon were placed under quarantine, and the parish of St Catherine placed under lockdown for 14 days.

In the face of the pandemic, the ODPEM provided support to the MOHW's activities as outlined in the COVID-19 Response Plan. Ongoing initiatives executed by ODPEM included support to the Ministry of Labour and Social Security and respective municipal corporations for welfare distribution; coordination support for pleasure crafts under quarantine at Jamaica's ports; and the support to the Controlled Re-entry Programme. As at December 31, there were 12 915 confirmed cases (7 031 females) and 303 deaths²⁸ (see chapter on Health). Preliminary cost of losses associated with the event for the initial stage of the disaster (between March and June 2020) was estimated at \$84.59 billion or 4.0 per cent of GDP/Real Value Added. The productive sectors, primarily tourism and agriculture,

29 registered the highest losses amounting to \$49.59 billion combined. In the infrastructure sector (transportation, electricity, and water and sanitation), the cost of impact was estimated at \$1.28 billion,³⁰ most of which was in the transport sub-sector and categorized as public losses. The social sectors of education, health, culture, entertainment and sports incurred losses amounting to \$31.53 billion or over 37.3 per cent of the total losses.

Tropical Storms Zeta and Eta

The 2020 Atlantic Hurricane season produced over 30 named storms and hurricanes in the months of October and November, the country experienced heavy rains as a result of Tropical Storms Zeta and Eta and affecting mainly southern and north-eastern parishes. Damage and losses related to infrastructure and the agriculture sector from these events were estimated at \$6.7 billion with an additional \$762.1 million estimated for further road improvement and rehabilitation.

Over 200 roads islandwide were impacted by the storms. Hazards included landslides, breakaways, failure of embankment and retaining walls, inundation of roads and flooding of communities due to blocked drains by silt and debris. Among the roads most severely affected were the Gordon Town Road (St Andrew), Thompson Town to Victoria (Clarendon) and Papine to Bull Bay (St Andrew). Damage and loss associated with the road network amounted to \$4.2 billion including \$1.0 billion to reopen blocked roads and \$3.2 billion for remedial works to improve drivability.

Where impact on the population was concerned, 114 dwellings in over 60 communities were damaged, nine of which were fully destroyed. Two individuals lost their lives in Bull Bay. State and non-state relief agencies distributed 983 food packages and other relief supplies to persons in affected communities, primarily in Kingston, St Andrew and St Thomas.

For the agriculture sector, preliminary estimates for losses of both crops and livestock amounted to \$2.5 billion affecting the livelihoods of 14 181 farmers. The persistent rainfall caused significant damage to a wide variety of crops including: legumes, vegetables, condiments, fruits, cereals, plantain, banana, Irish and sweet potato, yam, cassava, other tubers, and sorrel. The worst affected parishes were St Elizabeth, Manchester, Clarendon, St Thomas and St Andrew. Over 2 900 hectares of crops valued at \$2.45 billion were affected.

Some 780 livestock farmers across eight parishes

28. COVID-19 Clinical Management Summary, MOHW.

29. At the time of reporting, information for the Industry and Commerce sector had not yet been received.

30. At the time of writing, information from the major telecommunications providers had not yet been received.

experienced losses amounting to \$38.9 million. Over 32 000 animals were lost, including 30 000 broilers and layers valued at \$12.0 million. While poultry farmers suffered the brunt of the losses, other livestock farmers who reared pigs, cattle and small ruminants also experienced losses. In addition, beekeepers lost 295 colonies of bees valued at \$12.1 million.

Environmental impacts included damage to slopes, coastal, agro-forest and freshwater ecosystems. Major impacts to the natural and built environment were as a result of land slippages which were generally widespread. An assessment of the five parishes most impacted by the rains indicated that the major causes of flooding could be attributed to the excessive rainfall that occurred, combined with large volumes of sediment and debris generated which exceeded the capacity of the drainage network to effectively transmit water (NEPA, 2020).

Fire

The total number of genuine calls for the year was 10 209, an increase of 131 relative to the previous year (Table 3.12). Similar to 2019, the largest number of genuine fire calls occurred in Kingston and St Andrew (1 945) followed by St Catherine (1 672). Increases were recorded in seven parishes with Hanover showing the largest percentage change (96.5 per cent), followed by Westmoreland (75.8 per cent) and Portland (50.0 per cent).

A total of 1 796 persons were impacted by fire, 616 fewer than the previous year, representing a 25.5 per cent decrease. The number of deaths decreased from 35 to 31. There was a 48.0 per cent increase in the number of persons

TABLE 3.12
NUMBER OF GENUINE FIRE CALLS, 2019-2020

PARISHES	2019	2020	% Change
Kingston and St Andrew	2 033	1 945	-4.3
St Thomas	438	557	27.2
Portland	366	549	50
St Mary	678	376	-44.5
St Ann	1 048	792	-24.4
Trelawny	365	381	4.4
St James	988	738	-25.3
Hanover	230	452	96.5
Westmoreland	326	573	75.8
St Elizabeth	647	592	-8.5
Manchester	653	872	33.5
Clarendon	525	710	35.2
St Catherine	1 781	1 672	-6.1
Total	10 078	10 209	1.3

Source: Jamaica Fire Brigade

TABLE 3.13
IMPACT OF FIRE, 2018-2020

Impact	Category	2018	2019	2020
Death	Civilian Adults	30	28	28
	Children	9	7	3
	Firefighters	0	0	0
	Sub Total	39	35	31
Injuries	Civilian Adults	76	44 ^r	53
	Children	3	2	17
	Firefighters	18	14	19
	Sub Total	97	60	89
Rendered Homeless	Civilian Adults	1 584	1 531	1 194
	Children	754	785	482
	Firefighters	0	1	0
	Sub Total	2 338	2 317	1 676
Total	Total	2 474	2 412^r	1 796

r – revised

Source: Jamaica Fire Brigade

sustaining injuries while the number rendered homeless fell to 1 676 from 2 317 (Table 3.13). Civilian adults continued to account for most (71.0 per cent) of the affected population. Children remained vulnerable to fires accounting for three deaths, 10.0 per cent of the recorded deaths, and 17 injuries.

The number of non-structural fires increased by 2.6 per cent and accounted for 85.7 per cent of the total fires reported (Table 3.14). This increase was influenced largely by the occurrence of coal kiln fires which more than

TABLE 3.14
CLASSIFICATION OF FIRES, 2019-2020

Classification	Type	2019	2020	% Change
Structural Fires	Residential Buildings	1 185	1 117	-5.7
	Commercial Buildings	290	275	-5.2
	Others	61	64	4.9
Sub total		1 536	1 456	-5.2
Non - Structural Fires	Farms/Cultivated Lands	229	311	35.8
	Bush	5 838	6 127	5
	Refuse Sites	1 572	1 371	-12.8
	Electrical Equipment	506	577	14
	Motor Vehicles	379	346	-8.7
	Coal Kilns	8	21	162.5
Subtotal		8 532	8 753	2.6
Total		10 068	10 209	1.4

Source: Jamaica Fire Brigade

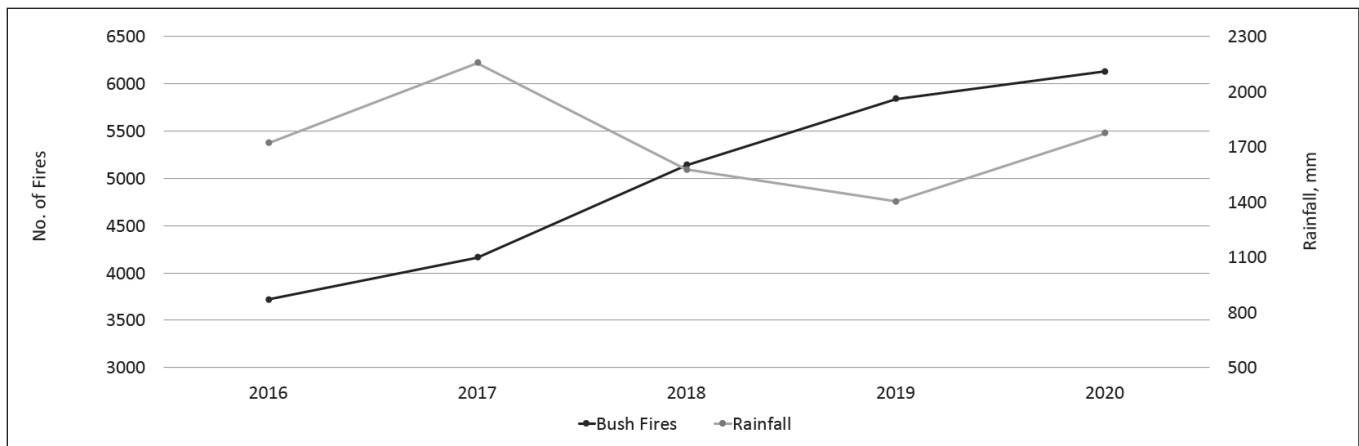


FIGURE 3E: CORRELATION OF BUSH FIRES AND RAINFALL, 2016-2020

doubled to 21 as well as by a 35.8 per cent increase in the number of farms/cultivated land fires. In contrast, the number of structural fires (1 117) declined by 5.2 per cent. Annual changes in the number of bush fires were assessed against the volume of average annual rainfall and a strong correlation was observed. Even though the country experienced wetter conditions, there was an increase in the number of bush fires (Figure 3E). It is important to note that rainfall was not spread evenly throughout the year (see section on Climate). Bushfires were more prevalent in the parishes of St Catherine (1 038), Kingston and St Andrew (684) and Manchester (661) which experienced drier conditions as indicated by drought indices from the MSJ (see section on Climate).

Earthquakes

A total of 701 seismic events were recorded, 346 more than recorded in 2019. The Earthquake Unit at the UWI indicated that the increase in the number of recorded events was due primarily to the greater sensitivity and reliability of equipment received under the Jamaica Disaster Vulnerability Reduction Project. Local events³¹ accounted for almost 30.0 per cent on year and over 23.0 per cent of recorded events during January. Of the 18 felt events, 16 occurred on the mainland with magnitudes between M2.8 and M4.6. The Blue Mountain Block remained the most active with 29.7 per cent of local events and a half of felt events on the mainland occurring in that sub-area. There were 296 near events³² ranging between M2.4 and M7.2, 137 regional events, and 53 events due to blasting (see Appendix 3A).

31. Local events occur on the island and in close offshore areas.

32. Near events are detected within 14° – 22° North and 72° – 82° West.

Disaster Risk Management

Disaster Risk management initiatives undertaken during the period focused primarily on responses to the COVID-19 pandemic and Tropical Storms (TSs) Zeta and Eta (see section on Natural and Man-made Hazards). These included the preparation of over 130 situation reports on the COVID-19 pandemic in communities impacted by TS Zeta and Eta including the Bull Bay and Shooters Hill communities; the preparation of a preliminary Damage Assessment Report and Action Plan for Bull Bay and the mobilization of three registered volunteers under the National Disaster Risk Management Volunteer Programme in the Bull Bay Community following severe weather impacts that occurred in October to November 2020.

National Alert Tone - Consistent with the provisions of the DRM Act, 2015, efforts commenced towards the development of a National Alert Tone. The Jamaica Information Service was contracted through the OPDEM to design, develop and air the appropriate radio, tele-vision and print advertisements across all media houses to promote the use of the National Alert Tone before and after the broadcast of a national emergency announcement.

Through a grant from the African Caribbean Pacific-European Union-Caribbean Development Bank Natural Disaster Risk Management (ACP-EU-CDB NDRM) programme, the Jamaica Fire Brigade's response capabilities were boosted with the procurement of a vehicle-mounted skid unit (fire pump), valued at US\$16.0 million, to reach areas previously inaccessible by the fire truck. Additionally, 35 GPS units were procured during the year at a total cost of approximately US\$40 000 with 33 being used in fire stations locally and two within the Met Service. Two Automatic weather Stations were installed under the project at pilot

sites selected for the development of the warning index model in Flagaman, St Elizabeth and Bull Head, Clarendon. The stations are also to be added to the network of the Met Service.

External Support Coordination Platform

The External Support Coordination Platform (ESCP) was developed in alignment with the SDG Goal 17—Strengthen the means of implementation and revitalize the global partnership for sustainable development from the perspective of technology use. The online application was developed out of a need to coordinate the pledges and support being received from International Development Partners at the onset of COVID-19 in Jamaica. Developed with funding from the UNDP, the ESCP is designed to facilitate the effective management of the external emergency response and assist in aligning offers from IDPs with the emergency needs of the Government; allow for better tracking of support in the form of funding, technical assistance and material donations; as well as generate reports for analysis. The platform is designed to improve transparency and accountability in the external support management process in the event of a disaster. While the platform will primarily address COVID-19 needs, it is designed in a format that will render it capable for use in the occurrence of a range of disaster events.

Spatial Data Management

Negotiations advanced towards the signing of an Enterprise Agreement (EA) and Master Agreement (MA) between the GOJ and Environmental Systems Research Institute (ESRI). This new agreement is to replace the extended Enterprise License Agreement (ELA) between the GOJ, ESRI and its local distributor. The new EA and MA is expected to provide a wide range of software applications and services, as well as technical support towards the development of specialised solutions (through an ESRI Advantage Programme) for three key areas—health, crime and economic development.³³ It also comprises capacity building through advanced ESRI-led training in the use of various software applications. A total of 265 government and quasi-government entities, as well as 179 educational institutions could benefit from the new agreement. A Land Information Council of Jamaica (LICJ) ELA Cost-Benefit Survey was conducted to ascertain the benefit of the four-year agreement³⁴ to the GOJ. Survey results indicated that

the technology was used predominantly as a decision support tool and towards cost-savings and income generation.

GIS Growth Survey

Twenty-five entities responded to the annual GIS Growth Survey,³⁵ four of which were from the private sector. Sixty-four per cent of the respondents both used and provided geospatial services. Seventy-six per cent indicated that GIS had been integrated into mainstream operations or business processes through, among other things, electricity outage and grid management; hydrologic data collection and analysis; asset and resource management; and archaeology impact assessments. Seventy-two per cent of the respondents maintained an internet map service or web mapping application. Of this amount, 30.4 per cent of the services/applications was available to the public. The majority was used for internal purposes. Publicly available services/applications included the Planning Institute of Jamaica's poverty mapping series, the National Land Agency's eLandJamaica and the Water Resources Authority's water resources information system.

Fifty-six per cent of the entities had documented policies regarding data ownership, sharing, maintenance and liabilities. Approximately 74.1 per cent required clients to sign an MOU or disclaimer for obtaining data from the organisation. Sixteen per cent practiced metadata management at all times. However, the majority (76.0 per cent) practiced metadata management inconsistently. Only one entity had complete and up-to-date metadata. Approximately 32.0 per cent and 28.0 per cent of the respondents indicated that less than 10.0 per cent and between 10.0 and 30.0 per cent, respectively, of their datasets had complete and up-to-date metadata (Figure 3F). Thirty-two per cent of the entities ensured that all data shared was accompanied by metadata, while 28.0 per cent had at least one staff dedicated to metadata management.

Approximately 52.0 per cent of the survey respondents sold geospatial data, products or services. Reported earnings from sales ranged from \$5 658 to \$38.8 million. With regard to budget, 20.0 per cent of the entities indicated that less than 10.0 per cent was budgeted for GIS software, hardware and maintenance (Figure 3G). This was similar to those that indicated that between 10.0 and 20.0 per cent had been budgeted for this purpose. Thirty per cent were unsure if a budget was assigned and 16.0 per cent indicated that there was no budget for GIS software, hardware and maintenance in the organisation.

33. Support will be provided in other areas, however, emphasis will be placed on these three areas.

34. The original agreement was signed for four years (2015–2019), but has been extended to allow for negotiations and Cabinet approval of a new agreement.

35. A total of 57 entities were polled in the survey.

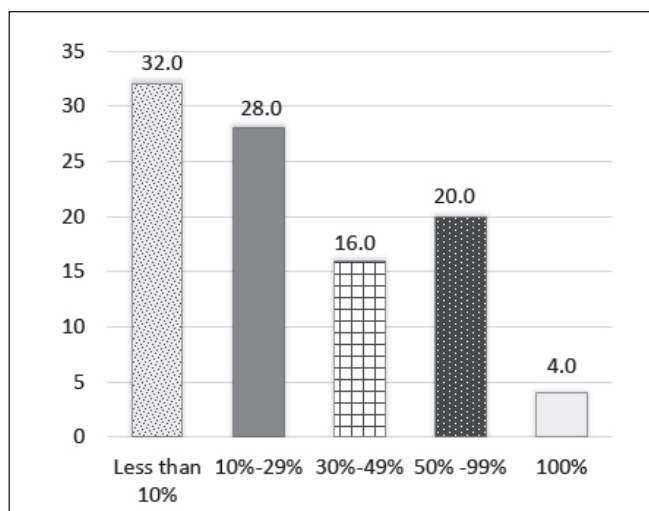


FIGURE 3F: DISTRIBUTION OF ENTITIES BY PER CENT OF DATASETS WITH COMPLETE AND UP-TO-DATE METADATA

There was an average of three GIS posts in organisations, while an average of seven persons performed GIS-related tasks (Table 3.15). This is relative to the averages of four and five reported for GIS post and persons performing GIS related task, respectively in 2019. Three persons migrated during the reporting period, compared with four in 2019.

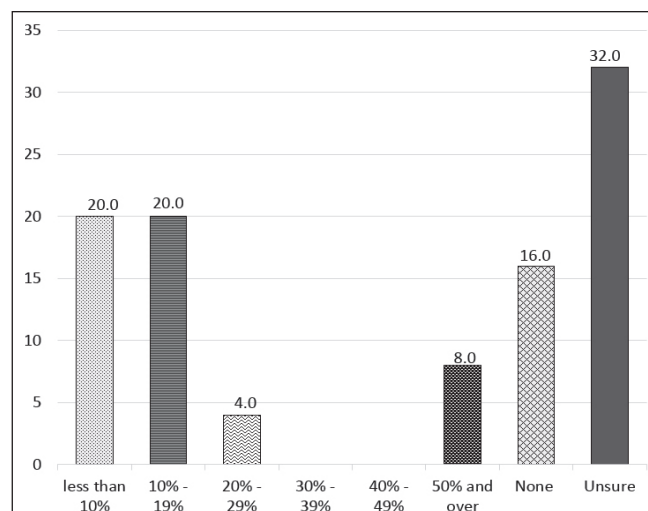


FIGURE 3G: DISTRIBUTION OF ENTITIES BY PER CENT OF IT BUDGET ASSIGNED TO GIS SOFTWARE, HARDWARE AND MAINTENANCE

Capacity-building activities continued with respondents indicating that more than 100 staff had participated in either local or international conferences, seminars and training during the reporting year. An average of six local and two international conferences/seminars, as well as five

**TABLE 3.15
SELECTED GIS GROWTH AND DEVELOPMENT INDICATORS, 2019-2020**

Indicator	2019	2020
Number of respondents to the questionnaire	25	25
Number of organisations that use and/provide GIS services	24	25
Number of organisations that have integrated GIS into its mainstream operations or business processes	18	19
Average number of GIS positions	4	3
Average number of persons who perform GIS tasks but are not employed in a GIS position	5	7
Number of persons trained and educated in GIS		
Certificate	120	104
Diploma	36	25
First Degree	53	52
Advanced Certificate/Diploma	3	20
Higher Degrees	27	25
GIS personnel lost to migration	4	3
Functional Data Servers	24	26
Functional Plotters	19	19
Functional Large Format Scanners	42	57
Average gross annual salary paid to GIS personnel (\$ million)	2.2	2.1
Average number of GIS software licenses	37	31
Number of organisations that sell spatial data/product/service	10	13
Average number of workshops, conferences, training courses etc. attended by staff		
Local conferences/seminars	2	6
Local training	3	5
International Conferences/Seminars	1	2
International training	1	2

Source: Data compiled from survey conducted by PIOJ

local and two international training sessions were reported for the year (see Table 3.15). The average number of software licenses in organisations was 31.

Geospatial applications

COVID-19 Mapping – The National Emergency Response GIS Team (NERGIST) was activated and deployed to the National Emergency Operation Centre (NEOC) at ODPEM on March 16 to support Jamaica’s response to the COVID-19 pandemic. This was the first time the team was activated in response to a health-related hazard and for an extended period. The team comprised 17 persons (11 males) from five GOJ entities, and provided daily support to the NEOC. Deployment continued until late June, and was reactivated in September for the rest of 2020 to support response to community spread of the virus.

During the deployment, NERGIST created daily COVID-19 status maps with information on the number of active cases, recoveries and deaths. The team also created six COVID-19 Dashboards, including the Hospital Bed Capacity Dashboard and the COVID-19 Monitoring Dashboard (Appendix 3B). The dashboards provided critical information to policy and decision-makers on, among other things, the number and location of confirmed cases, new cases, hospital bed capacity and deaths. Quarantine areas declared under the DRM Act were also mapped along with information on the location of relief distribution centres, health facilities, and contact tracing. All the COVID-19 related data mapped by NERGIST were provided by MOHW. The MOHW also provided daily and weekly reviews of NERGIST outputs. In addition, three ArcGIS Enterprise Server instant environments were developed and deployed at the Ministry to facilitate, among other things, the hosting of the COVID-19 Monitoring Dashboard.

The Ministry of Education, Youth and Information utilized geospatial technologies to aid decision-making regarding the face-to-face reopening of schools. This was done through mapping MOHW data related to the number and distribution of active cases and assigning vulnerability scores to school zones.

Census Mapping – continued under the National Water Commission’s Customer Census Mapping Project. The project aims to, among other things, detect illegal connections and billing irregularities; detect and monitor houses with inactive accounts; and identify premises for targeted meter replacement. The project is being carried out using GPS enabled android devices, ArcGIS Online and Collector for ArcGIS. To date, 95.0 per cent of the data collection and GPS mapping of existing and potential

customers in the parishes of Kingston, St Andrew, St Catherine, Clarendon, Manchester, St Ann, Trelawny, St James and Hanover have been completed. In addition, data from this census-mapping project has been used to support the Kingston and St Andrew Non-Revenue Water Reduction Programme, which aims to, inter alia, provide a more efficient distribution of water within the network.

Preparations towards the 2022³⁶ Population and Housing Census continued throughout the year. GIS and GPS technologies were used to conduct field-mapping exercises and to delineate census regions and supervisory areas. To date, field-mapping exercises have been completed in 13 parishes and supervisory areas delineated and mapped for eight. The draft census regions map has also been produced.

Natural Resource Management – Boundary verifications towards the management and monitoring of forest resources continued throughout the year. As at December 2020, ground truthing was completed for approximately 253.91km of the proposed boundary to be protected as the Cockpit Country (Appendix 3C). In addition, a total of 149km was permanently marked with custom monuments. Forest estate verification activities were also completed in the Cocoa Walk, St Catherine; Toms Hope, Portland; and Hallhead and Colley, St Thomas Forest Estates.

Election Day – Geospatial technologies were integral to logistics planning for the 2020 General Election. The Electoral Office of Jamaica (EOJ) employed GIS to establish travel routes for the deployment of supplies and to plan for response to the day’s activities. GIS was used to plot/find suitable locations for the placement of polling stations, counting stations, nomination centres and election centres, and to plan travel routes for the safe return of ballot boxes and the EOJ team.

In addition, geospatial technologies facilitated the sharing of critical information between the EOJ and the joint operation of the Jamaica Constabulary Force and the Jamaica Defence Force who were tasked with security logistics for the day. Electoral results were shared real-time on interactive maps from the Election Centre and made available to the Jamaican public via the media.

Web GIS

Development and testing of the **National Spatial Planning Information Technology** (NSPIT) platform was completed. The platform comprises a viewer, metadata portal, help portal and an Application Programming Interface (API) for developers. The viewer provides access to a variety of spatial datasets (economic, social and

36. The national census has been delayed by a year due to the impact of the COVID-19 pandemic.

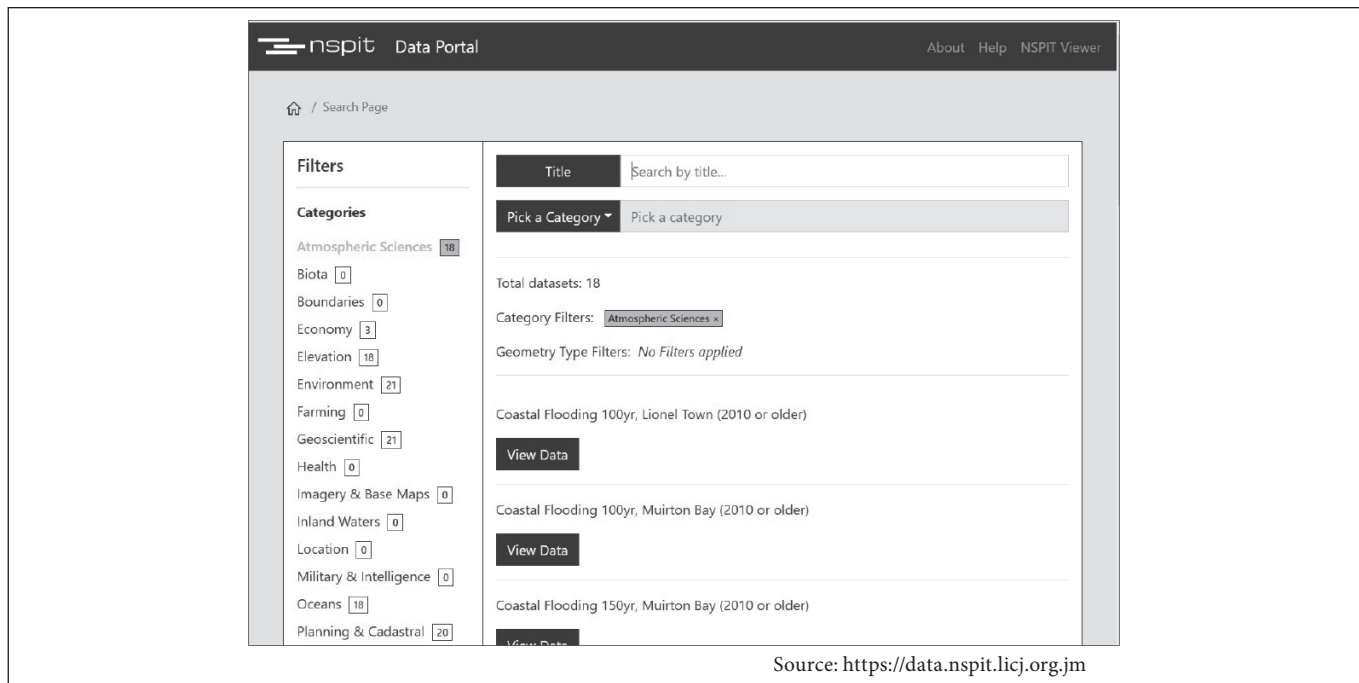


FIGURE 3H: SNAPSHOT OF THE NSPIT METADATA PORTAL

environmental) for Jamaica. It also provides geoprocessing tools that allow users to create buffers, place points and draw lines and polygons. Users can download the buffers created from their geoprocessing or print a map displaying their results.

The metadata portal provides information on, among other things, the currency and quality of the datasets within the NSPIT. Users can download selected dataset from this portal and search the database by title or using a predefined filter (Figure 3H). The help portal is a guide to the use of the viewer and metadata portals.

The **BRIMMS Bridge Inspection Application** was developed by the NWA to streamline the data collection process for bridge inspections. Inspections are carried out annually to ascertain the structural integrity of bridges and to assign a rating of their condition across the island. This traditionally manual process was automated using ArcGIS Survey 123 on mobile phones. The application allows engineers to map and view the conditions of bridges in real-time, add attribute data and geotag photos of the existing state of the bridge being inspected. The BRIMMS Bridge Inspection Application has significantly improved the efficiency and speed of the Agency's data collection process by, inter alia, reducing the introduction of human errors. To date, 123 bridges have been inspected using the application.

A **Bird Shooting License Sales Locations Application** was developed and rolled out by NEPA to support the granting of licenses and improve hunters' experience with

the purchasing of licences for the Game Bird Hunting Season. This publicly available app shows the location of vendors that sell hunters' licences across the island. Contact details such as the name of the vendor, address and telephone number are provided in the app. Users can also calculate distance and direction from a point, such as their current location, to the nearest vendor.

The **Regional Coastal Integrated Information Management System**, an online coastal and marine metadata platform, was developed for the Caribbean under the Investment Programme for the Caribbean Regional Track of the PPCR. It includes metadata for 103 spatial and non-spatial datasets from the six PPCR countries. It should help to support the development of national and regional climate resilience programmes, analyses and planning activities in the Caribbean.

Capacity Building and Awareness

Training

The LICJ GIS Training Programme was significantly impacted by the COVID-19 pandemic as no training sessions were held at the LICJ Geo-informatics Lab during the year. In addition, the joint LICJ and UWI Mona summer course in Applied GIS and Remote Sensing was cancelled for the first time since its inception in 2016.

A number of virtual training sessions were held in lieu of face-to-face training. These sessions were facilitated by Microsoft Teams and the Ready Tech platform, which allowed for virtual access to ArcGIS Desktop/Pro software.

TABLE 3.16
ELA TRAINING SESSIONS AND NUMBER OF PARTICIPANTS, 2020

Course Name	Number of Participants		Total	Participating Entities
	Male	Female		
ArcGIS I: Introduction to GIS	16	18	34	32
Creating Story Maps	20	14	34	31
ArcGIS II: Essential Workflows	16	14	30	30
ArcGIS III: Performing Analysis	10	10	20	20
ArcGIS IV: Sharing Content on the Web	21	15	36	34
Image Analysis for ArcGIS	14	9	23	22
ArcGIS Online: Essential Workflows	16	16	32	31
Migrating from ArcMap to ArcGIS Pro	9	13	22	23
ArcGIS Pro Essential Workflows	9	11	20	19
Putting ArcGIS to Use Across your Organization	15	11	26	19
Field Data Collection and Management using ArcGIS	11	6	17	15
Building Geodatabase	9	3	12	12
ArcGIS Enterprise: Configuring a Base Deployment	10	2	12	11
ArcGIS Enterprise: Administration Workflows	10	2	12	11
Deploying and Maintaining a Multiuser Geodatabase	9	3	12	11

Source: National Spatial Data Management Division

Under the GIS in Schools Education Programme/ELA for Schools Training Programme, 24 geography and social studies teachers and lecturers (19 females) from 24 schools completed training in Introduction to GIS, ArcGIS Desktop Installation and ArcGIS Online.

Fifteen courses were offered under the GOJ ELA Training Programme. Each course had on average two sittings and 11 participants. Training was offered in Field Data Collection using ArcGIS; Migrating from ArcMap to ArcGIS Pro; and Deploying and Maintaining a Multi-User Geodatabase, among others (Table 3.16).

Training in use of Light Detection and Ranging (LIDAR)³⁷ and related data products was organised by the Investment Plan for the Caribbean Regional Track of the PPCR. The 5-day training course was attended by 19 persons from Jamaica and the Caribbean and involved lectures and hands on exercises to equip participants with skills to manipulate and analyse LIDAR imagery. The course was a culmination of a US\$1.9 million initiative to collect and process LIDAR data into bathymetric and topographic information/products for Jamaica and Haiti. The data will be used for assessing coastal vulnerability and will further support climate analysis related to sea-level rise, storm surges, and flooding in the Caribbean.

Awareness

Awareness raising activities included the Virtual Jamaica COVID-19 Geospatial Forum; the 2nd Jamaica GIS User Conference; and the annual Geography Awareness Week of Activities. The forum was held on May 28 under the theme, *Mapping COVID-19 in the Caribbean – Opportunities for the Future*. It showcased the use of geospatial technologies, tools and applications to support response to the COVID-19 pandemic across the Caribbean and in North America. Over 900 persons participated in the event, with 19 presentations from nine countries. Participating countries included Mexico, St Maarten, Trinidad and Tobago, Guyana, Canada and the United States of America.

The 2nd Jamaica GIS User Conference was held virtually on September 23 and 24 under the theme, *Geospatial Technologies: Shaping Our Future*. Over 700 persons participated in the event, which focused on the use of GIS in, inter alia, crime analysis, urban and regional planning, climate change and disaster risk management.

The annual Geography Awareness Week of activities was held from November 12–20. Activities included a virtual GIS Technical Seminar, church service and the 18th GIS Day Exposition. The traditional multi-agency exhibition to commemorate GIS Day was replaced by a virtual event, which included Geo-talks on careers in GIS.

37. Light Detection and Ranging (LIDAR), is a remote sensing technology which uses the pulse from a laser to collect measurements. It is used primarily to examine the surface of the earth, assess information about the ground surface, create a digital twin of an object or detail a range of geospatial information. LiDAR systems harness this technology, using LiDAR data to map three-dimensional models and digital elevation. <https://geoslam.com/what-is-lidar/>.

OUTLOOK

The policy and planning framework for climate change and environmental management should be further strengthened with Cabinet approval of key policies as White Papers, and commencement of implementation. These include the Beach Access Management Policy and the Biosafety Policy. Likewise, Cabinet is expected to approve the updated Climate Change Policy Framework which along with the completion of the activities under the CAEP, should set an appropriate base towards pursuing and advancing emissions targets under the NDC. Additionally, a National Adaptation Plan (NAP) for Jamaica will commence for completion over 24 months.

With respect to climate data and information management, completion of the 2019 State of the Jamaican Climate, the most recent climate projections, should render data more available to aid planning at all levels. This should be supplemented by real time reporting of the upgraded hydromet network as well as the full operationalization of the new Doppler weather radar in Coopers Hill, St Andrew.

In the area of disaster risk management, a number of plans and guidance documents should be completed and adopted at the national and local levels. These include a National Framework for DRM, National Disaster Risk Coordination Plan, Protocol and Guidelines to Mainstream

Gender in DRM/CCA, National Relief Clearance Plan, and Community DRM plans for 14 communities.

The National Survey of Squatter Settlements, which commenced in 2019, is expected to be completed. Data from the survey will provide important socio-economic, demographic and environmental information to drive settlement upgrading decisions and to inform broader housing and development policies.

Advancement of the resilience agenda is expected to be supported by the completion of the Long term Low Carbon and Climate Resilience Strategy and the implementation of the Blue Economy Framework Project, which will seek to foster growth in Jamaica's blue economy and sustainable use and management of ocean and marine resources. Policy effectiveness should also be improved through the development of a Systemic Risk Assessment Tool for Climate Resilient Infrastructure under the Coalition of Climate Resilient Investment (CCRI)/Oxford University Project.

It is expected that as the COVID-19 virus continues to impact the island, a number of SD related activities may be delayed including the implementation of projects and programmes scheduled for completion in 2021. To support the recovery efforts, however, the country is expected to benefit from technical and advisory services for the development of a medium-term COVID-19 Recovery Strategy and Plan. ■

SCIENCE, TECHNOLOGY AND INNOVATION

INTRODUCTION

Science, technology and innovation (STI) remained an important component of national development, through the application of scientific knowledge and technological innovation across various sectors. Sustainable energy, food security, research and enhancement of the national quality infrastructure remained among the areas prioritized and supported by \$11.0 billion or 1.3 per cent of the national budget for Financial Year 2020/2021. Notable achievements included:

- establishment of the Hazardous Substances Regulatory Authority (HSRA), the first body in the English-speaking Caribbean dedicated to radiation protection and safety
- passage of the Data Protection Act, 2020, and the Patents and Design Act, 2020, along with approval for electricity regulations under the Electricity Act, 2015, towards strengthening of the legal framework in support of STI
- adoption of 32 scientific product standards and launch of seven standards establishing safeguards for operation of the cannabis industry
- improved ranking to 72nd place on the Global Innovation Index, which positioned Jamaica for the first time among the top 80 countries and enabled its placement on the list of high innovation achievers.

Supporting the bio-economy, the application of tissue culture technology continued to facilitate production of clean planting materials for the propagation of crops such as sweet potato, irish potato and sweet yam, as well as the preservation of endangered endemic species of orchid and cacti. Expansion of digital connectivity to facilitate easier delivery of Government-Government (G2G), Government-Business (G2B) and Government-Citizen (G2C) services during the COVID-19 pandemic included the launch of five additional hotspots; connection of more than 400 public entities to the islandwide broadband network; distribution

of e-learning devices; and the launch of a number of platforms and applications.

GLOBAL TRENDS IN STI

Global gross expenditure on research and development (GERD) registered a 5th consecutive annual increase with investments estimated at US\$2.4 trillion in terms of Purchasing Power Parity.¹ This represented a 2.7 per cent increase or an additional spend of US\$64.0 billion compared with the previous year. The rank order for global research and development (R&D) spending remained unchanged with the United States of America (USA) leading, followed by China, Japan, Germany, India and South Korea. Cumulatively, these countries accounted for 69.1 per cent of the global share. Disaggregated by region, more than 90.0 per cent of R&D investment came from Asia (44.3 per cent), North America (27.0 per cent) and Europe (20.5 per cent). Similar to 2019, the average GERD to Gross Domestic Product (GDP) was 1.7 per cent. South Korea registered the largest GERD:GDP at 4.4 per cent, followed by Israel (4.0 per cent) and Finland and Japan (3.5 per cent each). GERD as a percentage of GDP is an important STI indicator that signals countries' commitment to exploring new knowledge, innovation and product and service development.

The 11th edition of the United Nations Environment Programme Emissions Gap Report indicated a temporary decrease in carbon dioxide emissions, attributed in part to the limited operation of the transportation sector during the COVID-19 pandemic. Notwithstanding the emissions decrease, the report noted that global temperatures would still exceed an increase of 3°C this century, surpassing the goal of the Paris Agreement to limit global warming to well below 2°C above pre-industrial levels, and pursue efforts to limit it to no more than 1.5°C. Low-carbon pandemic recovery measures combined with Nationally Determined Contributions (NDCs) were highlighted as opportunities to

1. Purchasing Power Parity facilitates comparison amongst countries with differing currencies, by converting values to a common currency based on the cost of a common basket of goods.

reduce greenhouse gas emissions by approximately 25.0 per cent. Some of the measures suggested included “support for zero-emissions technologies and infrastructure, reducing fossil fuel subsidies, and backing nature-based solutions”.²

Some 45 countries, representing 31.6 per cent of global emissions and 25.2 per cent of the global population, submitted new or enhanced NDCs to the UNFCCC³ in 2020. Jamaica’s NDC, which was submitted in June, reflected enhanced ambitions with new targets in land use/land cover (LU/LC) and the forestry sector, as well as expanded energy targets (see chapter on Sustainable Development).

Notable Breakthroughs

Emerging technologies continued to enhance the global STI landscape in areas such as R&D, realization of improved public health and clean energy. Selected breakthroughs in 2020 included:

- **Record-breaking development of vaccines for the Coronavirus Disease 2019 (COVID-19).**⁴ Following the emergence of the SARS-CoV-2 virus in December 2019 and its subsequent classification as a pandemic in March 2020, more than 200 vaccines were developed for testing. The vaccines work by stimulating an immune response to an antigen found on the surface of the virus. Each vaccine is developed using one of four possible approaches: whole virus, protein sub-unit, viral vector, or nucleic acid. The development of these vaccines is the shortest recorded timeframe for vaccine creation.
- **Local development of a ventilator prototype**⁵ in response to the shortage of medical equipment to treat critically ill COVID-19 patients. The model, developed by entrepreneurs from two local private companies, is comprised of locally sourced and 3-D printed parts. It automates the otherwise manual process of squeezing a bag valve mask (‘ambu bag’) to provide ventilation.
- **Mind-controlled arm prosthesis with sensation of touch.**⁶ This technology, referred to as neuromusculoskeletal prosthesis, is an improvement on existing bionic limbs which work via electrodes that have been implanted in the nerves and muscles belonging to the amputation stump of an upper limb. Recent breakthroughs have led to the inclusion of force

sensors in the prosthetic thumb, which send electrical signals to stimulate the nerve and communicate with the brain. This means that for the first time, amputees can feel the characteristics of objects with which they interface and are better able to determine the amount of force needed to squeeze or grab an object. The prostheses have been successfully tested on subjects with amputations above the elbow and the technology is expected to eventually include patients with amputations of the leg and below the elbow.

- **Development of bladeless wind turbines.**⁷ The turbines, designed without blades, produce clean energy by using the vibrations generated as the structure oscillates in the wind. The new design is comprised of a vertically fixed curved topped cylinder and elastic rod and brings benefits such as reduced operational noise, better visual impact, lower maintenance costs and is considered less of a hazard to birds than its bladed counterpart. Bladeless turbines currently stand at 10 feet (~3 metres) high, and there are plans to extend to ~459 feet (140 metres) with a power capacity of 1 megawatt.

STI AT THE NATIONAL LEVEL

Policy and Regulatory Framework

With the official launch of the Hazardous Substances Regulatory Authority (HSRA), Jamaica became the first country in the English-speaking Caribbean to establish a full regulatory body for radiation protection and safety. Under the Nuclear Safety and Radiation Protection Act, 2015, the HSRA has responsibility for the regulation of any activity, practice, apparatus, or facility that utilizes ionizing radiation and nuclear technology. The establishment of the HSRA is also expected to open new frontiers in areas such as agriculture and health. Two statutes and one set of regulations were passed in the Houses of Parliament and serve to bolster the legal framework in the sector. These included:

- *The Data Protection Act, 2020*, which provides guidelines for the collection, processing, storage, use, and physical or electronic disclosure of personal data. A two-year transitional period was established to facilitate full compliance of data controllers.

2. United Nations Environment Programme (UNEP), Emissions Gap Report 2020.

3. United Nations Framework Convention on Climate Change.

4. <https://www.gavi.org/vaccineswork/there-are-four-types-covid-19-vaccines-heres-how-they-work> Accessed March, 2021.

5. <https://www.mona.uwi.edu/fpas/-jamaican-inventors-prototype-ventilator-and-3-d-mask> Accessed April 2021.

6. <https://www.sciencedaily.com/releases/2020/04/200430110321.htm>. Accessed March, 2021.

7. <https://www.intelligentliving.co/skybrators-bladeless-turbines-clean-energy-via-vibration/> Accessed April 2021.

- *The Patents and Design Act, 2020*, enables, among other things, the safeguarding of intellectual property and improves Jamaica's compliance with international conventions such as the World Trade Organization (WTO) agreement on Trade-related aspects of Intellectual Property. The Act repealed the 1857 Patents Act and the 1937 Designs Act.
- *Electricity (Electrical Work, Registration and Licensing) Regulations* which are adopted under the Electricity Act, 2015, and inter alia, make provisions for privatization of electrical inspection functions and modernization of the electrical inspection process.

Policy-related actions for the period included the hosting of a series of consultations on the National Science, Technology and Innovation (ST&I) Policy Green Paper. Among other activities undertaken were the revision of the Energy from Waste Sub-Policy and the completion of drafting instructions for the National Nutraceutical Industry (NNI) Regulatory Framework and the Food and Drugs Act, 1975.

STI Financing⁸

Budgetary allocation for selected STI projects, programmes and initiatives was approximately \$11.0 billion or 1.3 per cent of the total budget for FY2020/2021. Compared with 2019, this represented a 1.8 per cent decrease in allocations (Table 4.1). The Recurrent budget recorded a 1.1 per cent increase and continued to account for the largest share of public STI financing. Notable areas of investment included a 70.6 per cent increase to facilitate the provision of ICT necessary to counter the effects of physical distancing restrictions associated with the COVID-19 pandemic. The funds were earmarked primarily to support, among other things, the provisions of devices under the Tablets in Schools initiative, along with training for teachers (see section on e-readiness). Budgetary allocation made for modernization of public sector ICT infrastructure and support for R&D amounted to more than \$90.0 million and was primarily targeted for *Cannabis* product development; \$30.0 million was programmed for expansion of small business development centres.

The Capital budget contracted by 36.5 per cent compared with 2019, owing in part to reduced appropriations for the energy sector. This reflected in large part, the effects of the close out of the Energy Efficiency and Conservation Programme and closing down of the Petroleum

Corporation of Jamaica (PCJ) which led to rescoping of the Energy Management and Efficiency Programme. Provision of \$67.0 million was however, made for the development of national guidelines for the disposal of hazardous waste and undertaking an energy efficiency and conservation survey. Allocation was also made to continue energy retrofits at a number of healthcare facilities.

STANDARDS DEVELOPMENT AND ACCREDITATION

Thirty-two product standards were promulgated by the Bureau of Standards Jamaica (BSJ) related to *Cannabis* (3); Hand Sanitizers (1); Toy Safety (6); Household and similar Electrical Appliances (5); Fluorescent and LED Lamps (2); Electric Cables, Insulation, Conductors and Enclosures (9); Refrigerating Appliances (3); Pre-packaged Goods (2); and Bamboo Straws (1). Eight standards were also launched by the BSJ during the period. Of these, seven related to medical *Cannabis* with the remaining being the JS ISO 31000:2019 Risk Management Guidelines.

A number of tests were carried out to ensure product quality and safety. As per amendments to the Petroleum Quality Control Act, 2017, a total of 422 samples of octane gasolines, automotive diesel oil and ethanol were collected and tested with 237 certificates of analysis being issued by the BSJ to petroleum marketers for refined and imported fuel. The certification is part of the mechanism to monitor the quality of petroleum distributed and sold in the island. Extensive testing was also carried out on local and imported alcohol-based sanitizers in the wake of the COVID-19 outbreak. The samples were required to satisfy a minimum 60.0 per cent alcohol by volume for efficacy. Two new tests were introduced for trans-fats and cholesterol in food products ahead of new standard requirements for nutrition fact panels commencing in 2021. Regulation of the medical cannabis industry was strengthened with a two-year authorization granted to the BSJ to receive, test, handle, transport and dispose of *Cannabis* for medical, therapeutic and scientific purposes, on behalf of the Cannabis Licensing Authority. To this end, the chemistry laboratory was upgraded to facilitate 24 tests on *Cannabis* products.

Accreditation and Training

Eight national conformity assessment bodies (CABs)⁹ were awarded accreditation certificates by the Jamaica

8. Budgetary information is taken from the Estimates of Expenditure as presented on February 18, 2020.

9. Conformity Assessment Bodies (CABs) seek to assess compliance of a process, product, or service to a relevant technical standard. They include entities such as testing and calibration laboratories, certification bodies as well as inspection bodies.

TABLE 4.1
BUDGETARY ALLOCATION FOR SELECTED STI PROGRAMMES AND AGENCIES (\$000)^a

PROGRAMME	REVISED	REVISED	% CHANGE
	EXPENDITURE 2019/2020	ESTIMATES 2020/2021	
RECURRENT BUDGET			
Ministry of Industry, Commerce, Agriculture and Fisheries			
Agricultural Research & Development	540 605	0.0	-100.0
Veterinary Services (Laboratory Services, Quarantine, Field Operations and Animal Fertility, Epidemiology, Public Health and Food Safety)	381 815	0.0	-100.0
Quarantine Services/Produce Inspection and Food Inspection	600 514	0.0	-100.0
Industrial Development and Export Promotion (Intellectual Property Rights, International Standardization, MSME Support and Development)	1 814 125	0.0	-100.0
Ministry of Industry, Investment and Commerce			
Industrial Development and Regulation (MSME support and development; Intellectual Property Rights; Agro-industrial Development)	0.0	687 805	-100.0
Hazardous Substances Regulation	36 603	22 817	-37.7
Investment and Export Promotion	0.0	286,060.0	-100.0
Ministry of Agriculture and Fisheries			
Research and Development	0.0	227 546	-100.0
Agricultural Health Food and Safety (Disease Surveillance, Pest Control; Food Safety)	0.0	533 756	-100.0
Ministry of Science, Energy and Technology			
Scientific and Technological Services (Research & Development - Operations of SRC, NCST and ICENS; and ST&I Development)	730 456	714 087	-2.2
Fuel and Energy (Cooperation, electrification services, Energy Conservation and management, policy)	1 032 765	722 081	-30.1
Post and Telecommunications	2 051 525	2 195 960	7.0
ICT Development, Access and Use (ICT Policy and Regulation; Infrastructure Development; ICT Propagation - E-Learning; Security of ICT Systems)	2 770 693	4 726 534	70.6
Ministry of Transport and Mining			
Research and Development	0.0	14 032	100.0
Geological, Geo-technical and Regulatory Services	213 813	195 815	-8.4
Scientific and Technological Services (Minerals Sector and Geological Development)	31 539	33 444	6.0
Ministry of Economic Growth and Job Creation			
Spatial Data Management	132 282	88 113	-33.4
TOTAL RECURRENT	10 336 735	10 448 050	1.1
CAPITAL BUDGET			
Ministry of Industry, Commerce, Agriculture and Fisheries			
Research & Development	295 600	0.0	-100.0
Industrial Development and Export Promotion	207 916	0.0	-100.0
Ministry of Agriculture and Fisheries			
Agricultural Research and Development	0.0	126 288	100.0
Ministry of Industry, Investment and Commerce			
Industrial Development and Export Promotion	0.0	197 332	100.0
Ministry of Science, Energy and Technology			
Energy Management and Implementation	314 304	223 732	-28.8
Postal Services (Upgrade to International Postal System)	44 472	0.0	-100.0
TOTAL CAPITAL	862 292	547 352	-36.5
GRAND TOTAL	11 199 027	10 995 402	-1.8

a-Estimates of Expenditure (2021-2022 Jamaica Budget)

Source: Estimates of Expenditure 2019/2020 report as presented February 18, 2021

National Agency for Accreditation (JANAAC).¹⁰ Of these, three were medical entities which met the requirements for quality and competence in medical laboratories (ISO 15189:2012), and five were testing entities which met the general requirements for the competence of testing and calibration laboratories (ISO/IEC 17025:2017). Certificates were received by JANAAC for the Inter-American Accreditation Cooperation (IAAC) Multi-lateral Recognition Arrangement (MLA) and the International Laboratory Accreditation Cooperation (ILAC) Mutual Recognition Arrangement (MRA) for the Accreditation of Inspection Bodies to the ISO/IEC 17020:2012¹¹ standard. This brings to three the number of standards for which JANAAC has extended its signatory status, the other two being the ILAC-MRA and IAAC-MLA for Testing Labs and Medical Labs. The MRA allows for the international recognition of test and inspection certificates produced by accredited medical and testing labs and inspection bodies.

A total of 281 technical assessors and industry personnel including quality managers, laboratory experts and internal auditors, benefited from the delivery of 10 ISO requirements and accreditation-related training seminars and workshops. The courses offered by JANAAC, included ISO 15189:2012 General Requirements for medical laboratories; Risk Assessment; Taking Effective Corrective Action; and the ISO/IEC 17020:2012 Requirements for competence for inspection bodies. Females represented 73.0 per cent of those trained. Other training activities included a five-day virtual session in Energy Efficiency Building Code Application and Compliance offered by the BSJ in collaboration with the CARICOM Regional Organization for Standards and Quality (CROSQ). The training resulted in the certification of 20 persons from public and private entities as inspectors. A total of 411 persons were trained through 19 courses offered in the areas of Good Manufacturing Practices; Root Cause Analysis; Documentation Requirements; Computer Numeric Control; Hazard Analysis & Critical Control Points (HACCP); ISO 31000 Risk Management; Understanding and Interpreting ISO 9001; ISO Internal Auditing; Problem Solving; 9001 Lead Implementer/Auditor; Enterprise Risk Management; Point of Care; ISO 22000 (Food Safety Management); and ISO 45001 (Occupational Health and Safety).

STI EDUCATION

Primary and Secondary Education

The results from Mathematics and Science in sittings of the Primary Exit Profile (PEP) are used to evaluate student performance in STI-related programmes. As a result of disruptions caused by the COVID-19 pandemic, the typical Performance Tasks and Curriculum Based tests were replaced by a modified, psychometrically approved assessment profile to facilitate placement of students at the secondary level. Of the 39 689 students registered to sit the examination, 38 918 were considered eligible for placement in secondary schools.¹²

The Grade 4 numeracy test evaluated student competence in three subtests: number operations and representation; measurement and geometry; and algebra and statistics. Of the 38 544 students assessed, Mastery level was attained by 66.0 per cent of candidates, while 27.0 per cent achieved Almost Mastery (two subtests) and the remaining 7.0 per cent fell in the category of Non-Mastery. A total of 39 422 students were assessed for Grade 5 Mathematics, of which most candidates were either categorized as Developing (41.3 per cent) or Proficient (39.7 per cent) {Table 4.2}. Of the total, those classified as Beginning or Highly Proficient represented 9.8 per cent and 9.2 per cent, respectively. For Science, 39 546 students were assessed, 37.8 per cent of whom performed at a Proficient level and 32.8 per cent were categorized as Developing. Candidates with scores in the Beginning or Highly Proficient categories represented 22.2 per cent and 7.2 per cent, respectively, of the total.

Performance in STI at the secondary level is assessed based on attainment of Grades 1–3¹³ in Mathematics and core science subjects (Biology, Chemistry, Physics and Information Technology) in the Caribbean Secondary Education Certificate (CSEC). The examination cohort comprised 33 139 students, with females representing 56.1 per cent. Subject passes were as follows: Mathematics, 61.2 per cent; Chemistry, 63.7 per cent; Physics, 76.6 per cent; Biology, 76.9 per cent; and Information Technology 89.2 per cent (see chapter on Education and Training).

10. JANAAC also provides accreditation services to other CARICOM member states (Bahamas, Barbados, Belize, Guyana, Suriname, St Lucia and Trinidad & Tobago).

11. 17020:2012 ISO/IEC 17020:2012 specifies requirements for the competence of bodies performing inspection and for the impartiality and consistency of their inspection activities.

12. Placement score was computed from results in Grade 4 Literacy and Numeracy, Grade 5 Mathematics, Science, Social Studies and Language Arts, and Grade 6 Ability Test (see Chapter on Education)

13. Grades 1-3 are considered “passing grades”. Attainment of Grades 1-3 in five subjects is the minimum required for matriculation to the post-secondary education level, and entry to the world of work.

TABLE 4.2
STUDENT PERFORMANCE IN MATHEMATICS AND SCIENCE IN THE PEP GRADE 5 ASSESSMENTS, 2020

Competence Level	Beginning		Developing		Proficient		Highly Proficient	
	Number of Students	% of Students	Number of Students	% of Students	Number of Students	% of Students	Number of Students	% of Students
Subject								
Mathematics	3 858	9.8	16 273	41.3	15 640	39.7	3 651	9.2
Science	8 787	22.2	12 968	32.8	14 931	37.8	2 860	7.2

Source: Ministry of Education, Youth and Information

Higher Education Institutions (HEIs)

Educational offerings at HEIs and their responsiveness to societal needs improved with the launch and revision of several courses. The University of the West Indies (UWI) introduced the “Coastal Habitat Restoration and Rehabilitation” course as part of the Master of Science degree in Marine and Terrestrial Ecosystems. Course revisions in the undergraduate Geography programme targeted exposure to progressive and transferable skills while the Introductory Chemistry courses and their respective credit values were revised to facilitate greater access by non-chemistry majors. The University of Technology, Jamaica (UTech, Jamaica) introduced two new undergraduate programmes namely, the Bachelor of Science in Mines and Quarry Management, and the Associate of Science in Police Studies and Management. The Master of Science degree in Engineering was revised to emphasize specializations aligned with national needs. Strengthening of the industry-academia interface was evidenced through the establishment of the JPS/Marubeni Power International Innovation Lab (iLab) under a Memorandum of Understanding between UWI and the Jamaica Public Service (JPS). The lab is designed to provide a space where staff and students can foster innovation.

HEIs Collaborative Research and Partnerships

Collaboration between HEIs and a number of other partners resulted in the execution of several activities during the year. These included:

- Hosting of the Youth Intervention Summer Technology Programme through a partnership between UTech, Jamaica and the Ministry of National Security. A total of 391 Grade six students from the St Andrew South Police Division participated.
- Development of local intelligent tracking digital applications under a partnership between UTech, Jamaica and a private geospatial technology firm. The apps were used to assess crowded hotspots for suspected COVID-19 cases.
- Signing of MOUs between UWI and NEPA for the

undertaking of research, including:

- Exploratory and feasibility studies on the products and potential products from Sargassum
- Determination of the breeding season for Queen Conch
- Rehabilitation of the Winns Morass ‘Parcel A’ Mangroves in Trelawny
- Ecological assessment of the Hope and Yallahs Rivers.

Additionally, in support of national research, groups were formed at UWI to tackle research in subject areas including: *Sargassum*; *Cannabis*; research computing; science education; and environmental monitoring.

STI Training and Popularization

The STI agenda continued to be furthered through various training opportunities and other means of popularization, notwithstanding the limitations imposed by the COVID-19 pandemic, which prevented a number of expos and fairs from taking place. Among the popularization events conducted were:

- Girls in ICT Day which was celebrated in April under the theme “I am a Woman in Technology” with the accompanying hashtag, #IamWITy. Associated events included a virtual conference designed to encourage women and girls to pursue studies and careers in ICT
- an online digital dialogue entitled “Expand Horizons, Change Attitudes” hosted by the Caribbean Community (CARICOM) Girls in ICT Partnership. The dialogue featured two presentations entitled “Girls and ICT: Actualizing CARICOMs potential” and “ICT, Youths and COVID-19”
- A “Conversation in Science” series hosted as part of the commemoration of the Scientific Research Council’s (SRC) 60th anniversary. The event, targeted secondary and tertiary institutions. Activities included interactive exhibits and workshops in robotics, biology and chemistry.

The pursuit of education in Science, Technology, Engineering and Mathematics (STEM) related fields, was promoted with the launch of a tertiary ICT scholarship under the Programme of Advancement Through Health and Education (PATH). The first of the five scholarships that will be offered each year, was awarded to a student enrolled in the Information and Communications Technology programme at Church Teacher's College in Mandeville. Additional support was provided under a Universal Service Fund (USF) Tertiary ICT Graduate Research grant programme which offers up to \$15.0 million to postgraduate students studying in the field.

Students from five secondary schools were trained to conduct Levels I and II energy audits as a part of a Caribsec Energy Management Competition hosted by the SRC. A total of 36 students (55.6 per cent males) and six teachers were trained and are to be further assessed over a six-month period. Thirty-seven persons from local and regional food production and regulatory agencies, along with graduate students were trained through the Better Process Control School (BPCS) hosted by The UWI. The BPCS is a United States Food and Drug Administration (USFDA) approved certification course for personnel who supervise the processing of low acid or acidified foods. The BPCS is recognized and monitored by the BSJ. Other training sessions were conducted by STI-related entities in areas such as food safety, food processing and pest management (Table 4.3)

with four harvested and analyzed in the parishes of Westmoreland, St Elizabeth, Clarendon and St Catherine. While no new varieties were produced for the year, those generated in 2018 were distributed to small farmers and estates to encourage establishment of propagation nurseries and to support commercial expansion for improved yields. To date, 27 varieties remain in commercial cultivation islandwide with potential yields of over 100 tonnes of cane per hectare under good agricultural practices.

Management of sugar cane related diseases was maintained with focus on Smut, Orange Rust and Ratoon Stunting. The incidence of Smut and Orange Rust was below 2.0 per cent. Under a plant breeding project being implemented by the SRC, a batch of ginger plants was gamma-irradiated to produce plantlets with resistance to Rhizome Rot Disease (*Fusarium sp.*, *Pythium sp.* and *Ralstonia sp. pathogens*), and sweet yam plants were x-ray treated to produce Anthracnose resistant or tolerant plantlets. Pathogens for both diseases were isolated and purified for use in further screening.

In terms of pests, the Sugar Cane Stalk Borer was managed under the Entomology Project implemented by the SIA. Results from the Annual Borer Damage Survey registered the pest's damage at 3.44 per cent, which was below the economic damage threshold of 5.0 per cent or less. St Catherine, Clarendon and Westmoreland were identified as hotspots for intervention. A total of 165 000 *Cotesia flavipes*, were produced as bio-control agents to

TABLE 4.3
SELECTED STI CAPACITY BUILDING ACTIVITIES – TRAINING, 2020

Area/Event	No. of persons trained	Responsible agency
Food Safety for Processors and Farmers	14	SRC
Tissue Culture	13	SRC
Global G.A.P. Training for Coconut Farmers and Processors	16	SRC/Coconut Board/CARDI, CariForum
Value Addition in Soap Making	5	SRC
Pest Management (for Public Health inspectors)	26	FSPID
Integrated pest management in food areas and Fumigation certification	28	FSPID
Good Regulatory Practices	85	BSJ
ISO/IEC Requirements and Related Accreditation Training Seminars	730	BSJ/JANAAC

Source: Data compiled from survey of Government agencies

Agriculture

Agricultural priorities included focus on the application of technology to improve crop resilience; propagation of clean planting material; and disease surveillance and monitoring. The generation of varieties suitable for cultivation across climate diverse areas of Jamaica continued under the Sugar Cane Variety Development Project, led by the Sugar Industry Authority (SIA). During the review period, 13 experiments were established,

aid in pest management activities. Pest management was also ramped up in other areas of the agriculture sector. Following multiple threat reports, five pests were flagged for increased attention, namely: *Tuta absoluta* (tomato leaf miner); *Ceratitidis capitata* (Mediterranean fruit fly); *Fusarium odoratissimum* (formerly *oxysporum f. cubense*) Tropical Race 4 (TR4); *Clavibacter michiganensis* (bacterial ring spot of potato); *Schistocerca gregaria* (desert locust) and *Vespa mandarinia* (Asian giant hornet). A strategy

was also developed outlining emergency responses and management plans to address TR4 wilt.

The production and export of bananas and plantains increased during 2020, notwithstanding drought conditions in 2019. More than 62 000 tonnes of bananas were produced and 746 tonnes were exported. With respect to the monitoring and management of diseases, the Banana Board was mandated to lead a task force on preparedness and emergency management of the TR4 disease. Forty-six suspected cases of TR4 were investigated with 12 samples analyzed using the Polymerase Chain Reaction Method; the presence of the disease was not found. Ongoing monitoring continued for bananas, plantains and Heliconia crops. A total of 23 banana farms were monitored for Moko disease which revealed that no new mats were infected. Forty-five samples were taken from farms in Portland and St Mary and tested for Black Sigatoka Disease fungicide resistance. Measures to exclude, detect, manage or eliminate disease included the installation of vehicle baths and foot baths at the Bodles Banana Breeding Station.

Work continued on validation of the climate resilience of popular sweet potato varieties under the Caribbean Regional Track of the Pilot Project for Climate Resilience (PPCR) Component 4, being led by the Caribbean Agricultural Research and Development Institute (CARDI). The second of two crop seasons was established and developmental parameters measured for the *Yellow Belly*, *Clarendon*, *Uplifta* and *Ganja* sweet potato varieties. For this purpose, 3 840 sweet potato slips were procured from local farmers in Clarendon, Manchester and Portland. Weather and climate data provided by automatic weather stations allowed for monitoring of temperature, daily rainfall, solar radiation, humidity and wind speed. *Uplifta* recorded the most favourable growth indicators during drier periods suggesting this variety had greater tolerance for dry conditions. The findings of a molecular characterization study showed the *Ganja* and *Fire on Land* varieties to also be drought tolerant. Conversely, *Yellow Belly* was found to have the least favourable performance and appeared to be most negatively affected by lack of moisture. Installation of a weaning and hardening facility was completed. The facility was outfitted with a fertigation system and will allow increased access to climate resilient crop material.

Several agricultural projects were supported under the Crop/Livestock Resilience & Sustainability Modelling Programme funded by the Special Climate Change Adaptation Fund of the Adaptation Program and Financing Mechanism, PPCR Jamaica. Among them, was the Agricultural Climate Change Evaluation for Production, Transformation and Resilience (ACCEPT

Resilience) project which assessed the growth and yields of climate-resilient crops such as cassava and sweet potato in the parishes of Clarendon and St Catherine. An online platform and a mobile app were developed for use by farmers, extension officers, and other agricultural stakeholders. Both have features that simulate the yields and biomass of crops under various climatic and agronomic scenarios. Two other projects related to livestock resilience also received support including a Thermal Regulation project implemented at Vere Technical High School to provide radiative cooling for the floors of the chicken coops at the school, and the Infrastructural Improvement for Climate Smart Goat Rearing project, implemented by Moneague College.

Implementation commenced for Phase 2 of the “Alliances for Coconut Industry Development Expansion and Enhanced Support for the Caribbean” project. The project is being implemented in 12 CARIFORUM countries by the International Trade Centre in partnership with CARDI and implemented locally in collaboration with the Coconut Industry Board and the Scientific Research Council (SRC). Activities included sowing of approximately 3 500 seed nuts at the nursery constructed under the project at Knockalva Polytechnic College, Hanover, and initiation of a study to determine the influence of grade and orientation on seed nut germination and seedling development. The capacity-building component resulted in five agri-processing companies and up to 50 smallholders being trained in food safety and hygienic processing. With the increased demand for sanitizing products, capacity building also focused on development of products such as coconut oil-based soaps.

Approximately three tonnes of stock and pile compost were produced for soil building exercises at the Sam Motta Demonstration and Training Center (SMDTC) in Manchester as part of efforts to demonstrate integrated production. The compost, generated from small ruminants’ manure, was used for fodder establishment and management. Ten students and a number of farmers (over the course of 25 visits) also benefited from knowledge sharing sessions on small ruminant production and new or improved technologies for farming on mined out lands.

Energy¹⁴

Investments in renewable energy (RE) from wind, solar and hydropower plants contributed 17.0 per cent of total generation capacity and 13.0 per cent of total electricity produced. Electricity from RE sources was boosted with the launch of a 94 MW Combined Heat and Power Plant at Jamalco. The plant, which is Jamaica’s third large-scaled plant fuelled by Liquid Nitrogen Gas (LNG), accounted

14. See chapter on Energy, Electricity and Water

for a 31.0 per cent increase in energy produced from LNG. The use of solar energy also expanded with installation and commissioning of a photovoltaic system at the Bengal Pump Station in Trelawny to drive irrigation processes. The system is expected to result in annual energy savings of \$3.0 million.

Sustainable energy production and diversification continued to be prioritized with the approval and roll out of the Integrated Resources Plan (IRP) intended to guide and support Jamaica's electricity generation for the next 20 years. The IRP, which was developed within the framework of the Integrated Energy Plan (IEP), targets outcomes such as increased renewable energy contributions; lower greenhouse gas emissions; job creation and economic growth; improved efficiency; and cost savings for customers. The IRP also targets installation of a 513.5 MW generation capacity by 2025, including power generation from solar, wind, hydroelectricity, waste-to-energy, and biomass. A strategic Electric Mobility Framework was prepared by the Ministry of Science Energy and Technology (MSET). A first step towards developing an electric mobility policy for the transportation sector, the framework outlines anticipated outcomes for the integration of battery electric vehicles into the national fleet.

The Energy Efficiency and Conservation Programme (EECP) came to a close with installation of energy efficient air conditioning retrofits in three Jamaica Constabulary Force (JCF) locations namely, the Mobile Reserve Headquarters in Kingston, the May Pen Division Headquarters in Clarendon, and the National Police College at Twickenham Park in St Catherine. A Hazardous Waste Management Manual for Energy Efficiency and Conservation Interventions in the public sector was developed and an EECP knowledge, attitudes and practices survey completed within the public sector with findings revealing an awareness level of 73.0 per cent. The programme aimed to raise awareness and increase energy efficiency in the public sector.

Health

Consistent with its mandate to ensure the safety and wholesomeness of commercial food, the Food Storage and Prevention of Infestation Division (FSPID) conducted 10 682 inspections, 16 rodent control programmes, and 2 534 laboratory analyses. The analyses included procedures to detect moisture content, extraneous matter, chemical residues, mycotoxin levels and fungal and bacterial contamination. The inspections resulted in the issuance of two detention notices and three disposal operations. Two new methods of analysis were adopted, one was the American Association for Clinical Chemists (AACC) Method 28-93.01 Direction of Insect Penetration in Food Packaging, which facilitates the determination of the

characteristics of insects that chew on food packages to differentiate between exit and entrance holes. The second was the Association of Official Analytical Chemists (AOAC) Method 28-44 Iodine Method for Insect Eggs, which is used to detect possible infestation in finished goods. Two fumigation training programmes along with a series of lectures on integrated pest management were offered by the FSPID to eight pest control operators (all males) and 20 members (11 females) of a private company. A total of 26 public health inspectors (23 females) were also trained via the Meats and Other Foods Post-Basic Diploma offered by UTech, Jamaica.

Approximately 15 000 analyses were conducted by the SRC to support the physical and microbial evaluations of food, wastewater and potable and recreational water. This included services specially provided to micro, small and medium enterprises (MSMEs) which resulted in requests for 322 certificates of analysis. More than 120 product samples were tested for trans-fat and cholesterol following upgrade of laboratories at the SRC and the BSJ in the previous year. The testing was done as part of the "Improving Household Nutrition Security and Public Health in CARICOM" project which also involves UTech Jamaica and the UWI. Results from the tests will provide baseline information on the concentrations of sugar, sodium, potassium and fat content in reformulated products, towards informing healthier food choices. A total of 106 nutrition fact panels were developed for local products seeking to access domestic and export markets. Additionally, a molecular biology protocol was optimized and implemented to facilitate rapid testing of plant, food and water samples for *Salmonella*, *E. coli* and Bile-Tolerant Gram-Negative Bacteria.

In supporting the safe use of radiological technology, 10 radiation surveys were conducted by the International Centre for Environmental and Nuclear Science (ICENS) at several sites, including the Jamaica Customs Agency, the Central Sorting Office, the Norman Manley and Sangster International Airports, and a number of dental X-ray units. Some 7 000 dosimeters were processed to determine exposure to ionizing radiation and 200 medical and industrial workers were trained in radiation protection and dosimetry as required under the Nuclear Safety and Radiation Protection Act, 2015. Testing of 152 seawater samples was conducted to determine nitrate and phosphate levels. Neutron activation analysis and direct mercury analysis were used to test 119 samples of pelagic algae —*Sargassum fluitans III*, *S. Natans I* and *S. Natans VIII*— for toxic elements such as arsenic and mercury. An additional 41 samples of *Sargassum spp.* were analyzed for short, intermediate and long radionuclides. The results are expected to inform an integrated approach to mitigating the impact of *Sargassum* blooms on coastal activities as

well as to assess its potential for use in animal feed, food, fertilizers and pharmaceuticals.

TECHNOLOGY USE AND TRANSFER

Support by Public STI Agencies

Geospatial applications and technologies were used to support the country's response to COVID-19 through the work of the National Emergency Response Geographic Information Systems Team (NERGIST). Assistance included use of data provided by the Ministry of Health and Wellness to spatially map case information, comprising new cases, case distribution, deaths, and recoveries. An ArcGIS COVID-19 monitoring dashboard was developed to display the information in real time (see chapter on Sustainable Development). The country's testing capacity for COVID-19 was enhanced with the provision of a real time reverse transcription polymerase chain reaction (RT-PCR) instrument along with 2 000 test kits by ICENS in collaboration with the International Atomic Energy Agency (IAEA).

Support for the propagation of clean plant material was provided by the SRC in collaboration with the National Environment and Planning Agency (NEPA). During the period, three endangered orchid varieties (*Epidendrum ramosum*, *Dichaea glauca*, *Pleurothallis laxa*) were propagated as part of efforts to protect endemic and endangered flora. Additionally, three varieties of cacti (Bunny Ears, Shafer's *Opuntia* and Ladyfinger) were identified and provided by the Tourism Product Development Company (TPDCo) for tissue culture propagation.

Services to ensure food safety were provided by the SRC to food product clients through the completion of 51 formulations, of which 20 were introduced to market. More than 15 000 analyses were conducted for clients on food, water and wastewater samples. Capacity building was also provided to five agro-processing companies in the areas of food safety, hygienic processing and product development, while approximately 50 smallholders were targeted for training in market opportunities and compliance with hygiene and safety standards.

Energy and Waste

Wastewater management services continued to be offered by the SRC, toward more environmentally friendly systems. Eight wastewater treatment systems were constructed for

a number of locations, including housing developments and commercial sites. Additionally, four feasibility studies were conducted and four plants with inadequate wastewater management were assessed. Rehabilitation of a treatment plant at the Mavis Bank Coffee Factory resulted in a pollution load reduction of 673m³/d.

Promotion of the circular economy was boosted under Component 4 of the Plastic Waste Minimization Project. Approximately 15.2 tonnes (33 580 pounds) of plastic material were collected within the Rae Town community as part of a marine waste project. A portion of the plastic waste was recycled and reused within the community. The aim of the project was to improve knowledge and change behaviours surrounding solid waste management and ultimately reduce the volume of marine waste entering the Kingston Harbour. The project also evaluated the potential for a circular economy, through the repurposing of plastics to make useful items.

e-Readiness¹⁵

The expansion of ICT infrastructure to support access to internet and related services intensified in response to new 'work-from-home' and 'learn-from-home' modalities implemented due to COVID-19. Five public Wi-Fi hotspots were launched—Chapelton and May Pen (Clarendon); Port Antonio (Portland); Ocho Rios (St Ann); and Annotto Bay (St Mary) under the Connect Jamaica Programme, bringing to 13 the number of hotspots available to the public. Each hotspot can accommodate approximately 200 simultaneous users.

Support was given to the education sector with the distribution of 23 946 tablets under the Tablets for Teachers Programme and 34 219 under the Tablets in School Programme. More than 2 000 teachers were trained in the use of online learning management systems to aid remote delivery of classes. A smart mathematics laboratory was opened at Tarrant High School in St Andrew. The first of its kind, the lab is equipped with smart technology that allows instructors to interact with mathematics specialists globally. The smart lab also allows students to connect to sessions remotely and enable teachers to record lessons and access online learning material to enhance their classes.

e-Government¹⁶

The adoption and use of ICT to facilitate easier delivery of G2G, G2B and G2C services continued with the development of several platforms and applications. These

15. This section examines the level of preparedness to use ICTs to boost competitiveness and well-being.

16. e-Government relates to the use of ICT and its application by the government for the provision of information and public services to the people. It includes electronic interactions of three types: government-to-government (G2G); government-to-business (G2B); and government-to-consumer (G2C).

included:

- **JAMPRO National Business Portal (NBP)** designed to enable multiple business-to-government transactions simultaneously from one online location. Services to be facilitated include registering investment projects, applying for incentives, divestment of crown lands, various licence or permit applications
- **TAJ Mobile**, the first mobile application to be launched by Tax Administration of Jamaica. The app allows for conducting transactions on-line including payment of property taxes, motor vehicle fitness fees and traffic ticket fines; and searches for details on property such as valuation and strata numbers. More than 100 downloads of the app were registered
- **NSWMA Mobile App** launched to facilitate easier reporting of littering and illegal dumping. The app also allows users to report instances of delayed or uncollected garbage and provides information on the collection schedule along with tips for recycling. Each complaint is given a tracking number that allows tracking through to resolution. Photographs that are submitted also receive a geotag that is automatically transmitted to the NSWMA. More than 300 reports were logged and over 600 downloads were recorded
- **Traffic e-ticketing system** to, among other things, allow electronic access to drivers' vehicle information and ticketing history, as well as improve efficiency by eliminating reliance on manual paper-based ticketing and data entry. The system was piloted by the Ministry of National Security in collaboration with eGov Jamaica Limited. Roll-out will include the distribution of more than 100 smart devices and portable printers to traffic cops
- a digital platform designed by eGov Jamaica Limited for the Government Electrical Regulator (GER) to support licensing, registrations and enrolment of electrical inspectors, electricians and other technical assistants
- **MyHR+**, an integrated payroll and human resource

management information system, which allows for tasks to be completed remotely. The app is part of the public sector transformation process and intends to have at least 55 MDAs onboard over the course of three years. Approximately 30 public sector entities used the app during the year

- **External Support Coordination Platform (ESCP)**, developed as a tool to better coordinate support offered to the Government by international partners by aligning assistance with emergency needs, tracking financial, technical and material donations, and generating reports for analysis. The ESCP was funded by the United Nations Development Programme and will be managed by the Ministry of Foreign Affairs and Foreign Trade along with the Planning Institute of Jamaica (see chapter on Sustainable Development).

More than 400 public entities, including 42 libraries, 63 health centres, 60 JCF facilities, 69 post offices and 251 education institutions were connected to the islandwide broadband network. The Kingston Public Hospital and Victoria Jubilee Hospital also benefited from improved connectivity which will enhance timely transfer of digital X-rays, use of Computerized Tomography (CT) Scans and other processes that support delivery of healthcare.

Teledensity¹⁷

Teledensity rates decreased by 4.6 percentage points to 120.9 per 100 individuals, compared with the previous year. Fixed line penetration was recorded at 15.9 per cent and mobile penetration at 105.0 per cent (Table 4.4).

Electronic Banking Transactions

There were 791 commercial bank Automated Banking Machines (ABMs) installed and 45 002 Point of Sales (POS) terminals operational across the island as of December 2020. Compared with 2019, this represented increases of 4.8 per cent and 12.4 per cent, respectively. The volume of Jamaican dollar ABM transactions decreased by 9.4 per

TABLE 4.4
TELEDENSITY (PER 100 INDIVIDUALS) IN JAMAICA, 2016-2020

Year	Population	Landlines	Mobile Subscribers	Total	% Fixed line penetration	% Mobile penetration
2016 ^r	2 721 700	310 213	3 267 344	3 577 557	11.4	120.0
2017 ^r	2 725 900	297 026	3 091 222	3 388 248	10.9	113.4
2018 ^r	2 731 000	363 820	2 964 974	3 328 794	13.3	108.6
2019 ^r	2 734 100	398 048	3 023 873	3 421 921	14.6	110.6
2020	2 735 400	436 249	2 873 259	3 309 508	15.9	105.0

r – revised

Source: Office of Utilities Regulation (OUR)

17. The Teledensity rate is the number of fixed line and mobile subscriptions per 100 population

TABLE 4.5
VOLUME AND VALUE OF ABM AND POINT OF SALE TRANSACTIONS PROCESSED BY COMMERCIAL BANKS
FOR JANUARY TO DECEMBER, 2017-2020

	J\$ TRANSACTIONS									
	2017		2018		2019 ^r		2020		% Change	% Change
	Volume (M)	Value (\$B)	Volume (M)	Value (\$B)	Volume (M)	Value (\$B)	Volume (M)	Value (\$B)	2019/2020 Volume	2019/2020 Value
ABM Terminals	63.4	924.4	62.3	523.4	70.3	1 405.6	63.7	1 542.9	-9.4	9.8
Point of Sale Terminals	41.5	473.6	48.3	619.7	53.1	717.9	49.0	715.7	-7.7	-0.3
TOTAL	104.9	1 398	110.5	1 143.1	123.4	2 123.5	112.7	2 258.6	-8.7	6.4

	US\$ TRANSACTIONS									
	2017		2018		2019 ^r		2020		% Change	% Change
	Volume (000)	Value (M)	Volume (000)	Value (M)	Volume (000)	Value (M)	Volume (000)	Value (M)	2019/2020 Volume	2019/2020 Value
ABM Terminals	522.6	222.3	709.2	323.2	834.7	360.1	758.4	344.7	-9.1	-4.3
Point of Sale Terminals	3 280.3	732.4	3 470.0	766.3	4 219.1	842.5	1 883.6	369.7	-55.4	-56.1
TOTAL	3 802.9	954.7	4 179.2	1 089.5	5 053.8	1 202.6	2 642.0	714.4	-47.7	-40.6

r-Revised figures

Source: Bank of Jamaica Payment System Data Bulletin

cent to 63.7 million, notwithstanding a 9.8 per cent increase to \$1 542.9 billion in the value of the transactions, relative to 2019 (Table 4.5). For transactions at POS terminals, the volume of those processed decreased by 7.7 per cent to 49.0 million, however the value was relatively unchanged at \$715.7 billion, compared with the previous year. US dollar transactions processed at ABMs amounted to 758.4 million, which was a 9.1 per cent decrease relative to 2019. The value of these transactions also declined 4.3 per cent to US\$344.7 million. POS transactions recorded declined by 55.4 per cent to 1 883.6 million, with a value of US\$369.7 million.

INNOVATION

A Government of Jamaica CodeFest competition, spearheaded by eGov Jamaica Limited, was held under the theme “Connect, Code, Implement: Technological Solutions for National Development.” The competition targeted public sector workers with expertise in aspects of ICT. Five entrants submitted innovative solutions in the areas of education, agriculture, healthcare, commerce and crime. The winning team comprised of five employees from the Accountant General’s Department, eGov Jamaica and the Jamaica Intellectual Property Office (JIPO). The team presented an educational solution called “Digitized Connections, Education for Anyone, Anywhere” that seeks to ensure reliable connection for students during the pandemic. The platform features include online

registration, easy access to lessons posted by teachers and a mechanism for notifying mentors when students are absent. Inclusivity was taken into consideration with the text-to-speech feature and the ability to provide individualized attention to students with disabilities.

Another innovative solution emerged from the ‘Hack-Celerate’ Caribbean-wide digital hackathon which challenged participants from the region to develop ideas that could tackle COVID-19 related challenges in the areas of manufacturing, financial services and security. More than 400 groups, including 18 local teams, registered to participate in the three-day event. A group called ‘The Outliers’ copped the top prize with an app aimed at promoting physical distancing by allowing individuals to join the line at a business establishment before leaving their homes. The technology works by allowing users to search for the entity with which they desire to conduct business, view the existing queue and wait time, and determine the closest branch using geolocation. Along with a cash prize, the team was provided sponsorship to develop a prototype.

The 2020 Democratizing Innovation in the Americas (DIA) Labs Ideathon competition was held, attracting more than 100 entrants. The competition provided a platform for young professionals to start long-term innovative projects in areas such as education, health, economic relief, crime and security. Three graduate students from The UWI copped first prize in the category of crime and security with

a solution to combat the increasing crime rates associated with the economic disruptions caused by the COVID-19 pandemic.

An inaugural Innovation Challenge was held by UTech, Jamaica involving nine teams from its colleges and faculties. The team, Byte Size, won first prize with a platform named “Rentaly!” which connects students with homeowners with places for rent. Second place was tied between the groups Hackers X and K.R.E.M. Hackers X created an app called GoOut which allows local and international users to customize their stay in Jamaica by seeking out unique cuisine and other cultural elements. K.R.E.M.’s innovation “Track Taxi”, was designed to enhance commuter safety by providing real time information on taxis operating on a desired route.

For the Jamaica National Climate Innovation Pitch Challenge, of the eight teams participating, first prize was awarded to Preelabs Limited for an innovative technology to detect leaks, shut off water when not in use and help households and business better understand their water consumption. Second place was awarded to Artel that pitched a concept for a flood planning and impact tool which would determine the number of casualties, damage to roads and other infrastructure and resources needs during disasters. Integrated Recyclers Limited copped third prize with an idea for recycling Sargassum seaweed to animal feed.

Indicators of Innovation

Global Innovation Index (GII)

The GII is a detailed economic metric that allows countries to measure their innovation performance against other countries. The analysis that accompanies the index also helps to guide the formulation of long-term policies for improved productivity, job creation and economic development. In 2020, Jamaica scored 29.10 to rank 72nd of 131 countries on the GII (Table 4.6). Compared with the previous year, this was an improvement of 9 places overall and earned the country the position of 21st in the upper-middle income bracket and 7th in the Latin America and the Caribbean region. This performance resulted in two notable first time achievements namely:

- a position among the top 80 countries, compared with a previous ranking among the top 100
- becoming the only Caribbean island and one of two countries in the region to be listed among the innovation achievers, a group of 25 economies that outperformed their peers. With classification as an upper-middle income country, Jamaica’s innovation performance was considered to be above the level of its development.

On the Innovation Input Sub-Index, Jamaica fell two places, ranking 86th with a score of 37.19 (10th in the region). However, on the Innovation Output Sub-Index, the country improved seven places to earn the 62nd position with a score of 21.00 (3rd in the region). Areas of strength were identified for the following categories:

- Institutions – political environment and business environment
- Human Capital and Research – government expenditure on education
- Market Sophistication – ease of getting credit
- Business Sophistication – innovation linkages and knowledge absorption
- Knowledge and Technology Outputs – computer software spending
- Creative Outputs – intangible assets (e.g. trademarks, global brand value).

Areas identified for further improvement were primarily in the category for Infrastructure and included indicators such as use of information and communications technologies (ICTs), government online services, e-participation and general infrastructure.

TABLE 4.6
RANKING OF SELECTED COUNTRIES IN THE GLOBAL INNOVATION INDEX, 2016-2020

Region/Country	2016	2017	2018	2019	2020
Jamaica	89	84	81	81	72
United States of America	4	4	4	3	3
United Kingdom	3	5	5	5	4
Singapore	6	7	7	8	8
Canada	15	18	18	17	17
China	25	22	22	14	14
Dominican Republic	n/a	n/a	87	87	90
Trinidad & Tobago	n/a	91	91	91	98
Total number of countries in ranking	128	127	126	129	131

n/a - not available

Source: INSEAD, World Intellectual Property Office, SC Johnson College of Business and Cornell University

Intellectual Property

A total of 57 new patent applications were filed with the Jamaica Intellectual Property Office, six fewer than the previous year (Table 4.7). Of these, 10 (17.5 per cent) were Jamaican applications or the equivalent of 4.0 per million population, lagging again behind the Vision 2030 Jamaica target of ≥ 18.0 per million population. Of the applications, 60.0 per cent related to Product/Apparatus, with the

TABLE 4.7
PATENT APPLICATIONS TO THE JAMAICA INTELLECTUAL PROPERTY OFFICE, 2016-2020

COUNTRY	2016		2017		2018		2019		2020	
	Applications	Granted	Applications	Granted	Applications	Granted	Applications	Granted	Applications	Granted
Jamaica	19	1	11	0	27	1	14	2	10	2
United States of America	37	2	34	5	25	0			31	3
Germany	0	1	1	1	0	0	25	0	0	0
Canada	2	0	2	0	1	0	5	0	0	0
United Kingdom	4	1	1	0	6	0	2	0	1	0
Other	16	0	16	3	19	0	17	0	15	0
Total	78	5	65	9	78	1	63	2	57	5

n/a - not available

Source: INSEAD, World Intellectual Property Office, SC Johnson College of Business and Cornell University

remainder being for Pharmaceuticals (20.0 per cent); Engineering and Other (10.0 per cent each). Five patents were granted, two of which were domestic applications in the categories of Process/Method and Pharmaceuticals.

Publications

The number of Jamaican publications reported for 2020 was 164,¹⁸ an improvement of 20 relative to 2019. The field of Public Environmental Occupational Health registered the most publications (13), followed by Medicine General Internal (11), Oncology (10), Infectious Diseases (9) and Multidisciplinary Sciences (8).

OUTLOOK

Science, technology and innovation is expected to broaden its impact as greater emphasis is placed on national digitization and roll-out of the electro-mobility agenda. Policy and legislative work is anticipated to include finalization of amendments to the National Science, Technology and Innovation Policy and the Food and Drug Bill as well as approval of the National Biosafety Policy. In the area of R&D, work is scheduled to continue on *Cannabis*-derived products and new frontiers will be explored in the area of alternative building materials through the Bamboo in Affordable Housing Project which aims to construct three prototype homes from Bamboo.

New achievements in sustainable and renewable energy are anticipated with finalization and implementation of

the Integrated Resource Plan (IRP). A Renewable Energy Penetration Survey is expected to be undertaken by the Energy Division of MSET in a bid to determine the extent of renewable energy uptake. A complementary End User Survey will also be administered to investigate the changes in electricity load patterns and end use consumption allocations. The results should inform local forecasting for planning in the energy sector. Work is also expected to continue on the development of the electro-mobility infrastructure to support Jamaica's integration of electric vehicles (EVs). This should include deployment of approximately 12 EV charging stations under the second phase of the "Building a Sustainable Electric Mobility Ecosystem for Inclusion and Access Project". Additionally, investment in renewable energy and smart technologies is expected to be expanded in keeping with enhanced targets under Jamaica's updated NDC.

Further to the identification of digitization as a strategic priority for COVID-19 recovery, the Government's commitment to supporting new technological realities is expected to be reflected in a fuller roll out of the national broadband network. Preparation of the National Broadband Strategy is expected to be well advanced to support, among other things, the continued operations of businesses and other services. A national multi-agency broadband task force has been formed to spearhead the process which is being funded by the Inter-American Development Bank (IDB). The aim is to have every household and community connected to the internet by 2025. ■

18. Web of Science™ core collection database, accessed April 15, 2019, was used for publication counts. An advanced search was done as opposed to the basic search (include=Science, Technology and Social Science databases). This was delimited by: (i) country of origin = Jamaica; (ii) language = all languages; (iii) document type (include = article, review, book review; editorial material, proceedings paper, biographical item, letter) and (exclude = meeting abstracts and corrections); and (iv) publication year.

THE MACRO ECONOMY

Gross Domestic Product

Balance of Payments and External Trade

Money and Inflation

Fiscal Accounts

Finance & Insurance Services

GROSS DOMESTIC PRODUCT

INTRODUCTION

Real Gross Domestic Product¹ (GDP) was recorded at \$703 543.0 million for 2020 and represented the lowest level since 2002 (Table 5.1). This outcome was 9.9 per cent lower than the level recorded in 2019 and reversed the trend of growth previously established (Figure 5A). This lower level of output, the largest decline on record, was the direct result of the Coronavirus Disease 2019 (COVID-19) pandemic as well as the measures implemented to slow its spread, resulting in an economy-wide contraction. The impact of the pandemic was greater on the Services Industry which declined by 10.9 per cent. The Goods Producing Industry fell by 4.5 per cent (Table 5.2). All industries contracted, with the exception of Producers of Government Services, an indication of the severe impact of COVID-19.

The factors which contributed to the low economic performance were as follows:

- the COVID-19 pandemic and measures to curb its spread, including temporary border closures, curfews which curtailed productive hours and limitations on gathering, which restricted activities related to entertainment and dining out
- lower average employment² with a decline of 64 567 persons to 1 180 500, resulting in lower domestic demand
- lower external demand for some Jamaican goods and services, specifically for tourism
- lower output in the mining sector as a result of the closure of the Alpart refinery, which was in operation for nine months in 2019
- adverse weather conditions (drought and flooding) which hampered agricultural output
- lower business and consumer confidence, influenced by the uncertainty regarding the depth and duration of the pandemic, which curtailed investment.

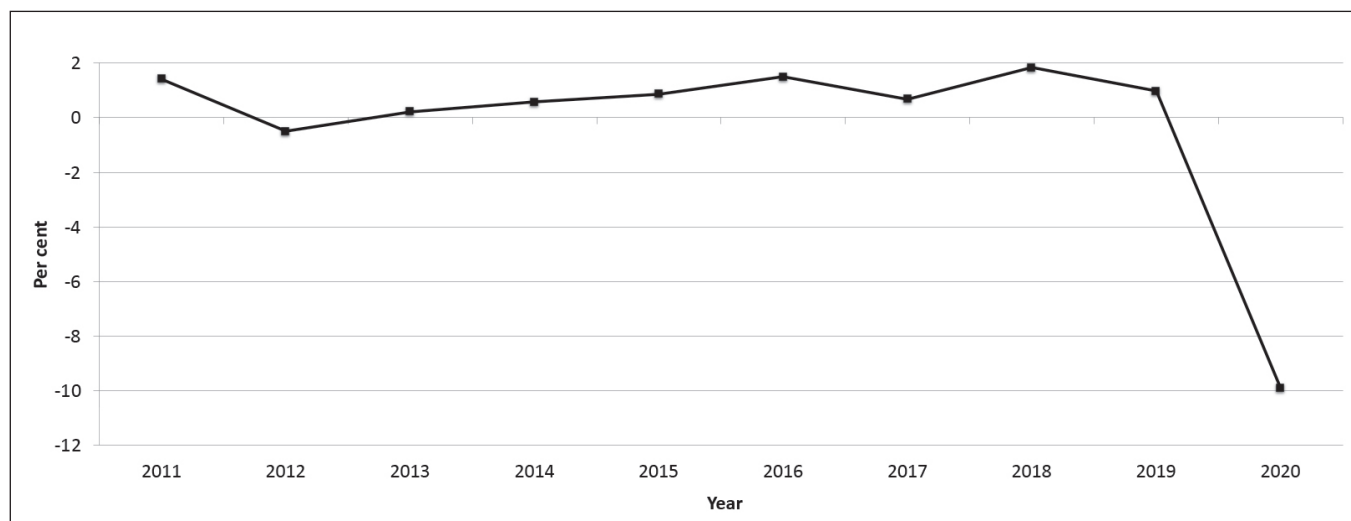


FIGURE 5A: CHANGE IN REAL GDP FOR THE JAMAICAN ECONOMY, 2011–2020

1. Due to the unavailability of Real GDP data at the time of writing, Total Gross Value Added in Basic Values at Constant Prices (Total Real Value Added) is used as a proxy for Real GDP. Real GDP = Total Gross Value Added in Basic Values at Constant Prices + Taxes Less Subsidies on Products.
2. Average Employment represents data for January, July and October of 2019 and 2020 as no survey was conducted in April 2020 due to COVID-19.

TABLE 5.1
VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES, 2016–2020
(\$MILLION)

	2016 ^f	2017	2018 ^f	2019 ^r	2020 ^p
GOODS PRODUCING INDUSTRY	189 956.8	189 156.3	199 015.0	197 656.9	188 777.6
Agriculture, Forestry & Fishing	55 019.4	53 093.5	55 269.5	55 491.3	54 694.3
Mining & Quarrying	16 456.1	15 787.2	21 116.3	18 719.3	14 697.3
Manufacturing	64 423.9	65 676.4	66 238.9	67 411.4	63 792.1
of which: Food, Beverages & Tobacco	37 190.4	38 156.4	38 528.9	38 926.4	37 115.1
Other Manufacturing	27 233.5	27 520.0	27 710.0	28 485.0	26 677.0
Construction	54 057.4	54 599.2	56 390.4	56 034.9	55 594.0
SERVICES INDUSTRY	594 603.4	600 785.4	606 155.1	616 163.5	548 757.9
Electricity & Water Supply	24 123.0	24 323.3	24 278.2	24 598.0	23 180.0
Transport, Storage & Communication	82 827.4	83 671.0	84 821.5	85 496.0	74 990.0
Wholesale & Retail Trade; Repair and Installation of Machinery	130 977.9	131 790.7	133 163.3	134 669.3	123 262.8
Finance & Insurance Services	83 537.3	84 776.9	85 897.2	89 069.6	85 728.8
Real Estate, Renting & Business Activities	80 549.5	81 073.9	81 721.7	82 341.3	80 422.0
Producers of Government Services	96 324.1	96 434.5	96 261.2	96 676.9	96 833.7
Hotels and Restaurants	43 735.2	45 500.0	46 238.3	48 486.8	22 411.1
Other Services	52 528.8	53 215.0	53 773.8	54 825.6	41 929.5
Less Financial Intermediation Services Indirectly Measured (FISIM)	30 049.6	30 305.1	31 652.7	32 796.6	33 992.5
TOTAL VALUE ADDED AT BASIC PRICES	754 510.6	759 636.7	773 517.3	781 023.8	703 543.0
Taxes Less Subsidies on Products	112 383.8	115 900.9	118 567.4	119 021.6	n/a
GDP AT MARKET PRICES	866 894.4	875 537.6	892 084.8	900 045.3	n/a

p - preliminary
r - revised
n/a - not available

Source: Statistical Institute of Jamaica

ECONOMIC POLICY FRAMEWORK

Vision 2030 Jamaica – National Development Plan is the master plan which continues to guide the formulation of Jamaica's policies and programmes. The Plan delineates the strategies to engender economic growth and development and is implemented through three-year phases of the Medium Term Socio-Economic Policy Framework (MTF). With respect to economic policy, the current MTF for the period 2018–2021 seeks to ensure a sustainable level of debt, maintain and promote financial stability and make sure that prices are predictable and stable.

In response to the onset of the pandemic, Government of Jamaica's (GOJ) policies focused on supporting the recovery of jobs and economic output. Towards this end, the maintenance of macroeconomic stability as defined in Vision 2030 Jamaica was recognised as the platform best

able to engender growth. Accordingly, the GOJ continued to pursue ongoing macroeconomic policies with some adjustment to directly address the COVID-19 impact. This policy direction was complemented by the adoption of an expenditure bias towards areas/initiatives aimed at addressing social fragilities and engendering greater resilience. Among these were, improving the capacity of the health system; enabling a digital economy through digitalization and deepening broadband connectivity; expanding the social safety net; increasing local value added capital expenditure; and strengthening economic resilience.

Additionally, the GOJ approached the International Monetary Fund and requested emergency financing in the amount of \$520.0 million through its Rapid Financing Facility (RFF). The RFF is geared towards providing

Balance of Payment support. The GOJ's application was approved in April.

The Fiscal Policy Paper (FPP) Fiscal Year (FY) 2020/21—an outcome mandated by the Financial Administration and Audit Act, 2014 and the Public Bodies Management and Accountability Act, 2014—was tabled in February 2020. This is done in accordance with the Vision 2030 Jamaica goal of achieving fiscal sustainability to promote economic growth. The FPP proffered the GOJ's quantitative targets for FY 2020/21, which included:

- real economic growth of 1.2 per cent
- inflation of 4.4 per cent
- primary surplus of 6.5 per cent of GDP

- fiscal surplus of 0.7 per cent of GDP
- debt stock of 87.2 per cent of GDP.

These targets were subsequently revised due to the impact of COVID-19³.

The Economic Reform Programme (ERP) is the Government's strategic plan of action to generate sustained economic growth and development. The ERP was supported up to 2019 by a Stand by Arrangement (SBA) with the IMF. Following its completion, the GOJ committed to continue to monitor the ERP in a similar manner to the SBA and as such Quantitative Performance Targets were established and will be monitored through a Priority Actions Matrix. The Priority Actions Matrix

TABLE 5.2
YEAR OVER YEAR CHANGE OF GROSS VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES, 2016–2020
(PER CENT)

	2016	2017	2018	2019	2020	Average ^a 2015–2019	Contribution to growth in 2020 Percentage Points
GOODS PRODUCING INDUSTRY	3.9	-0.4	5.2	-0.7	-4.5	1.8	-1.1
Agriculture, Forestry & Fishing	12.9	-3.5	4.1	0.4	-1.4	2.6	-0.1
Mining & Quarrying	-3.3	-4.1	33.8	-11.4	-21.5	2.1	-0.5
Manufacturing	1.9	1.9	0.9	1.8	-5.4	1.7	-0.5
<i>of which: Food, Beverages & Tobacco</i>	2.5	2.6	1.0	1.0	-4.7	1.9	-0.2
<i>Other Manufacturing</i>	1.2	1.1	0.7	2.8	-6.3	1.6	-0.2
Construction	0.4	1.0	3.3	-0.6	-0.8	1.1	-0.1
SERVICES INDUSTRY	0.8	1.0	0.9	1.7	-10.9	1.0	-8.6
Electricity & Water Supply	3.6	0.8	-0.2	1.3	-5.8	1.4	-0.2
Transport, Storage & Communication	0.7	1.0	1.4	0.8	-12.3	1.0	-1.3
Wholesale & Retail Trade; Repair and Installation of Machinery	0.3	0.6	1.0	1.1	-8.5	0.7	-1.5
Finance & Insurance Services	1.3	1.5	1.3	3.7	-3.8	1.7	-0.4
Real Estate, Renting & Business Activities	0.5	0.7	0.8	0.8	-2.3	0.7	-0.2
Producers of Government Services	-0.1	0.1	-0.2	0.4	0.2	0.0	0.0
Hotels and Restaurants	2.1	4.0	1.6	4.9	-53.8	2.9	-3.3
Other Services	1.0	1.3	1.0	2.0	-23.5	1.4	-1.7
Less Financial Intermediation Services Indirectly Measured (FISIM)	2.2	0.9	4.4	3.6	3.6	2.2	0.2
TOTAL VALUE ADDED AT BASIC PRICES	1.5	0.7	1.8	1.0	-9.9	1.2	-9.9
Taxes Less Subsidies	0.6	3.1	2.3	0.4	n/a	1.5	n/a
GDP AT MARKET PRICES	1.4	1.0	1.9	0.9	n/a	1.2	n/a

Discrepancies in the contribution to growth section is due to rounding.

a - average calculated using the geometric mean

n/a - not available

Source: Statistical Institute of Jamaica

3. See chapter on Fiscal Accounts.

includes priority actions related to macro-fiscal policy, monetary policy and financial sector development, and public sector transformation. As at the end of December, all quantitative targets with the exception of the Tax Revenue target were met.

The National Investment Policy (NIP) Green Paper, tabled in July, is aimed at attracting and facilitating greater levels of investment for Jamaica and will guide the development, administration, and monitoring of the investment community, to ensure cohesion among all related initiatives, programmes, incentive regimes and stakeholder contributions. A national business portal will be developed to complement and support the implementation of the NIP. It is envisioned that the portal will be an online platform housing the online business interface for all government entities involved in investment or business facilitation. In effect, the portal will be a one-stop shop for those who wish to invest and do business in Jamaica.

INDUSTRY PERFORMANCE

Agriculture, Forestry & Fishing

Real Value Added (RVA) for the Agriculture, Forestry & Fishing industry contracted by 1.4 per cent in 2020 (see Table 5.2). The industry's share of GDP increased by 0.7 percentage point to 7.8 per cent. The Planning Institute of Jamaica's Agricultural Production Index revealed that the contraction stemmed from lower production in the subindustries, Traditional Export Crops (6.8 per cent); Fishing (0.5 per cent); Animal Farming (4.5 per cent) and Post Harvest Activities (27.7 per cent). These outweighed an increase of 0.7 per cent in the Other Agricultural Crops sub-industry. The industry's low performance was due to adverse weather conditions as well as decreased demand, especially from the tourism sector, which was directly impacted by the pandemic and the restraint on people movement.

Mining & Quarrying

The Mining & Quarrying industry's RVA fell by 21.5 per cent compared with its 2019 level. Stemming from this, the industry's share of Total RVA was 2.1 per cent, 0.3 percentage point down from the share recorded in 2019 (Table 5.3). The production of Crude Bauxite and Alumina contracted by 2.5 per cent to 3 001.7 kilo tonnes and 25.4 per cent to 1 620.9 kilo tonnes, respectively. The decline in Alumina production was driven mainly by no output from the JISCO Alpart plant relative to nine months of activity in 2019.⁴ Lower production of Crude Bauxite was

a direct consequence of constrained demand from overseas purchasers.

For the Quarrying sub-industry, Industrial Minerals decreased as six of the nine minerals reported lower production. Chief among these was a 15.0 per cent reduction to 2.5 million tonnes of Limestone.

Manufacturing

There was a 5.4 per cent decrease in the RVA of the Manufacturing industry relative to 2019 which led to a 0.5 percentage point detracting from total RVA (see Table 5.2). The industry's share of the economy's output, however, increased by 0.5 percentage point to 9.1 per cent. The industry's decline resulted from lower output in both the Food, Beverages & Tobacco sub-industry by 4.7 per cent and the Other Manufacturing sub-industry by 6.3 per cent. Among the items for which production declined in the Food, Beverages & Tobacco sub-industry were poultry meat (8.0 per cent), animal feed (5.8 per cent) and sugar (27.0 per cent). Demand was also negatively impacted by COVID-19 and the accompanying measures to curb its spread.

The decline in the Other Manufacturing sub-industry resulted mainly from lower production of petroleum and rubber products. A further decline was prevented as the production of chemicals, cement and clinker increased.

Construction

RVA for the Construction industry shrunk by 0.8 per cent and accounted for 7.9 per cent of total output, 0.7 percentage point more than its share in 2019. This outcome was due mainly to a contraction in the Building Construction component as the Other Construction component increased. For Building Construction, fewer housing starts and reduced activities from non-residential projects were the main causes of the decline. The performance of the industry was negatively impacted by COVID-19. However, a further decline was tempered by the exemption of construction-related work in April.

Electricity & Water Supply

The Electricity & Water Supply industry declined by 5.8 per cent detracting 0.2 percentage point from the change in total RVA (see Table 5.2). Despite the decline, the industry's share of GDP increased by 0.2 percentage point to 3.3 per cent. The change in RVA reflected decreases in electricity consumption, by 7.0 per cent to 3 059.8 million kWh and water consumption, by 2.0 per cent to 83 126.2 megalitres. The industry's performance was due to lower demand for water and electricity stemming from the pandemic which resulted in reduced business hours (e.g. hotels).

4. The JISCO Alpart Alumina plant was closed in September 2019.

TABLE 5.3
CONTRIBUTION TO GROSS DOMESTIC PRODUCT IN BASIC VALUES AT CONSTANT (2007) PRICES, 2016–2020
(PER CENT)

	2016	2017	2018	2019	2020
GOODS PRODUCING INDUSTRY	25.2	24.9	25.7	25.3	26.8
Agriculture, Forestry & Fishing	7.3	7.0	7.1	7.1	7.8
Mining & Quarrying	2.2	2.1	2.7	2.4	2.1
Manufacturing	8.5	8.6	8.6	8.6	9.1
<i>of which: Food, Beverages & Tobacco</i>	4.9	5.0	5.0	5.0	5.3
<i>Other Manufacturing</i>	3.6	3.6	3.6	3.6	3.8
Construction	7.2	7.2	7.3	7.2	7.9
SERVICES INDUSTRY	78.8	79.1	78.4	78.9	78.0
Electricity & Water Supply	3.2	3.2	3.1	3.1	3.3
Transport, Storage & Communication	11.0	11.0	11.0	10.9	10.7
Wholesale & Retail Trade; Repair and Installation of Machinery	17.4	17.3	17.2	17.2	17.5
Finance & Insurance Services	11.1	11.2	11.1	11.4	12.2
Real Estate, Renting & Business Activities	10.7	10.7	10.6	10.5	11.4
Producers of Government Services	12.8	12.7	12.4	12.4	13.8
Hotels and Restaurants	5.8	6.0	6.0	6.2	3.2
Other Services	7.0	7.0	7.0	7.0	6.0
Less Financial Intermediation Services Indirectly Measured (FISIM)	4.0	4.0	4.1	4.2	4.8
TOTAL GDP AT BASIC PRICES	100.0	100.0	100.0	100.0	100.0

Discrepancies due to rounding.

Source: Statistical Institute of Jamaica

Transport, Storage & Communication

RVA for the Transport, Storage & Communication industry declined by 12.3 per cent relative to 2019, detracting 1.3 percentage points from the change in total RVA. Subsequent to this, the industry's share of total output fell to 10.7 per cent from 10.9 per cent in 2019. The industry was negatively impacted by the COVID-19 pandemic and the associated effects on people and cargo movement both locally and globally. The constrained performance was a result of decreases in both the Transport & Storage and Communication sub-industries. A reduction in the level of activity at the island's air and seaports (to include a period of temporary border closure aimed at stemming the spread of COVID-19) was the main contributor to the decline in the Transport & Storage sub-industry. The Communication sub-industry was impacted by lower demand in the telecommunications component as business hours were curtailed in an effort to slow the spread of the virus.

Wholesale & Retail Trade; Repair and Installation of Machinery (WRTRIM)

The WRTRIM industry declined by 8.5 per cent relative to 2019 but increased its contribution to total GDP by 0.3 percentage point to 17.5 per cent (see Table 5.2 and Table 5.3). The industry was impacted by COVID-19 and the accompanying measures manifested in lower average annual employment, declines in related industries, and reduced consumer and business confidence.

An examination of preliminary General Consumption Tax data showed that sales declined by 11.4 per cent in real terms and that seven of the eight goods categories recorded lower sales. The three largest contractions were recorded for Textiles, Clothing, Shoes & Jewellery; Minerals, Fuels, Lubricants & Petroleum Products; and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores. The category that recorded an increase was Hardware, Building Supplies, and Electrical Goods & Machinery.

TABLE 5.4
CONTRIBUTION TO TOTAL GOODS AND SERVICES PRODUCTION, 2016–2020
(PER CENT)

	2016	2017	2018	2019	2020
GOODS PRODUCING INDUSTRY	24.2	23.9	24.7	24.3	25.6
Agriculture, Forestry & Fishing	7.0	6.7	6.9	6.8	7.4
Mining & Quarrying	2.1	2.0	2.6	2.3	2.0
Manufacturing	8.2	8.3	8.2	8.3	8.6
<i>of which: Food, Beverages & Tobacco</i>	4.7	4.8	4.8	4.8	5.0
<i>Other Manufacturing</i>	3.5	3.5	3.4	3.5	3.6
Construction	6.9	6.9	7.0	6.9	7.5
SERVICES INDUSTRY	75.8	76.1	75.3	75.7	74.4
Electricity & Water Supply	3.1	3.1	3.0	3.0	3.1
Transport, Storage & Communication	10.6	10.6	10.5	10.5	10.2
Wholesale & Retail Trade; Repair and Installation of Machinery	16.7	16.7	16.5	16.5	16.7
Finance & Insurance Services	10.6	10.7	10.7	10.9	11.6
Real Estate, Renting & Business Activities	10.3	10.3	10.1	10.1	10.9
Producers of Government Services	12.3	12.2	12.0	11.9	13.1
Hotels and Restaurants	5.6	5.8	5.7	6.0	3.0
Other Services	6.7	6.7	6.7	6.7	5.7
TOTAL GDP AT BASIC PRICES	100.0	100.0	100.0	100.0	100.0

Discrepancies due to rounding

Source: Statistical Institute of Jamaica

Finance & Insurance Services

A 3.8 per cent decrease was reported for the Finance & Insurance Services industry (see Table 5.2). Despite this, the industry's share of total RVA increased to 12.2 per cent from 11.4 per cent in 2019 affirming it as the third largest industry. The industry was negatively impacted by the COVID-19 pandemic as demand for financial services contracted as firms withheld plans to invest. The industry's decline resulted from contractions in the monetary intermediation, other financial intermediation and insurance services sub-industries. The profitability of Deposit Taking Institutions was affected as there was lower fee and commission income due to declines in the volumes of transactions and increased usage of online banking. The local stock market also declined which led to less funds being managed by securities companies thereby affecting their profitability. The insurance segment of the industry was affected by increased joblessness as a result of the pandemic.

Real Estate, Renting & Business Activities

RVA for the Real Estate, Renting & Business Activities

industry decreased by 2.3 per cent. There was a 0.9 percentage point increase to 11.4 per cent in the industry's share of GDP. This performance occurred in the context of a general economic downturn which led to decreased demand for both real estate and business activities and the renting of machinery and equipment. The latter was impacted by the decline in the Construction industry.

Producers of Government Services

The Producers of Government Services industry was the only industry to record growth for the year, an increase of 0.2 per cent. As the second largest industry, Producers of Government Services accounted for 13.8 per cent of total output, 1.4 percentage point more than the share in 2019. This resulted from increased government employment to aid in the fight against COVID-19.

Hotels & Restaurants

There was a decline of 53.8 per cent in the Hotels & Restaurants industry, the largest rate of contraction among all industries for 2020. The industry's performance detracted 3.3 percentage points from the change in total

TABLE 5.5
VALUE ADDED BY INDUSTRY AT CURRENT PRICES, 2016–2020
(\$ MILLION)

	2016	2017	2018	2019 ^r	2020
GOODS PRODUCING INDUSTRY	402 810.3	440 224.1	488 056.9	493 293.6	507 574.4
Agriculture, Forestry & Fishing	116 203.3	125 673.9	133 640.6	148 144.3	170 792.5
Mining & Quarrying	34 273.6	43 535.8	62 076.2	37 734.4	28 928.3
Manufacturing	135 148.6	146 050.3	155 557.3	163 314.7	156 424.5
<i>of which: Food, Beverages & Tobacco</i>	83 314.2	89 137.8	92 773.3	97 000.8	95 388.9
<i>Other Manufacturing</i>	51 834.4	56 912.6	62 784.0	66 313.9	61 035.6
Construction	117 184.7	124 964.1	136 782.8	144 100.2	151 429.1
SERVICES INDUSTRY	1 128 470.1	1 186 572.7	1 259 231.6	1 323 453.8	1 239 334.6
Electricity & Water Supply	49 950.7	53 786.6	58 100.7	61 185.3	64 298.3
Transport, Storage & Communication	120 290.2	125 673.2	132 509.3	137 150.9	116 232.6
Wholesale & Retail Trade; Repair and Installation of Machinery	284 115.3	295 833.6	314 391.3	330 623.3	318 147.4
Finance & Insurance Services	152 138.2	166 126.8	176 603.0	189 820.8	181 703.9
Real Estate, Renting & Business Activities	166 672.3	174 371.2	180 932.4	187 064.7	187 426.2
Producers of Government Services	190 250.6	196 104.4	213 033.6	220 728.4	233 889.7
Hotels and Restaurants	68 359.0	72 973.4	77 171.0	84 159.4	46 401.3
Other Services	96 693.9	101 703.5	106 490.4	112 721.0	91 235.2
Less Financial Intermediation Services Indirectly Measured (FISIM)	66 180.6	78 157.5	91 121.9	102 234.2	104 394.3
TOTAL GDP AT BASIC PRICES	1 465 099.8	1 548 639.2	1 656 166.6	1 714 513.2	1 642 514.7
TAXES LESS SUBSIDIES ON PRODUCTS	295 875.9	346 385.8	371 084.4	395 919.4	324 413.8
GDP AT MARKET PRICES^a	1 760 975.6	1 895 025.0	2 027 251.0	2 110 432.5	1 966 928.44

a - Total GDP at Market Prices, is the sum of: Total GDP at Basic Prices and Taxes Less Subsidies on Products
r - revised

Source: Statistical Institute of Jamaica

output (see Table 5.2). Consequent on the decline, the industry's share of GDP decreased from 6.2 per cent in 2019 to 3.2 per cent in 2020. The industry was one of the main transmission channels through which the impact of the pandemic on the economy was manifested. The COVID-19 containment measures, including the limitation on the movement of persons and the size of gatherings, negatively impacted the demand for tourism-related services which also affected other industries through their linkages. There were fewer Foreign National arrivals at hotels and other accommodations, which were impacted by a period of border closure as well as the unwillingness of some persons to travel during the pandemic. The Restaurants sub-industry suffered from decreased demand particularly due to curfew measures imposed to stem the spread of the

virus. A further contraction in the industry was prevented by an increase in the average length of stay to 10.2 nights from 8.0 nights for Foreign Nationals.

Other Services

RVA for the Other Services industry declined by 23.5 per cent, the second largest industrial decline in 2020, detracting 1.7 per cent from the economy's growth. The industry accounted for 6.0 per cent of GDP, a fall from the 7.0 per cent recorded in 2019 (see Table 5.3). The industry's performance resulted mainly from the Recreational, Cultural & Sporting Activities sub-industry which, due to COVID-19, was negatively impacted by fewer tourist arrivals, less attendance at attractions and cancellation of recreational and sporting activities.

GDP at Current Prices⁵

Nominal GDP decreased by 6.8 per cent to \$1 966.9 billion. The output of the Services Industry amounted to \$1 239.3 billion and accounted for 63.0 per cent of GDP, a 0.3 percentage point increase compared with 2019. The Goods Producing Industry recorded a 2.9 per cent increase to \$507.6 billion, and accounted for 25.8 per cent of GDP. As a share of GDP, Taxes less Subsidies on Products accounted for 16.5 per cent, compared with the 18.8 per cent recorded for 2019 (Table 5.5).

OUTLOOK

The Jamaican economy is expected to grow in 2021, as it rebounds from the negative impact of the COVID-19 pandemic. This growth will in part depend on the success of vaccination against COVID-19, both locally and globally, as well as the pivoting of entities as they innovate to provide goods and services amidst the pandemic. The

pace of job creation will be a significant criterion for this expectation of growth, as domestic demand improves. All industries are expected to grow given the low base established in 2020. Chief among these will be the Hotels & Restaurants industry which will be able to increase its output following increased vaccination in source markets and given that the infrastructure (hotels, villas and other accommodations) were properly maintained during the downtime. The Construction industry is also presumed to be a driver of growth particularly through the avenue of civil engineering activities with road infrastructure projects. The major project underway is the Southern Coastal Highway Improvement Project which for 2021 is expected to be 50.0 per cent complete. Additionally, road repair works following damage to the network after heavy rains and flooding is also anticipated to contribute to the industry's growth. ■

5. GDP at current prices is current production valued at current prices. Therefore, a change in GDP at current prices reflects both changes in quantity and the price of production.

BALANCE OF PAYMENTS & EXTERNAL TRADE

INTRODUCTION

Jamaica's merchandise trade activity (imports and exports) was valued at US\$5 931.1 million, down 26.4 per cent relative to 2019. This out-turn stemmed from lower values of both exports and imports which reflected the adverse impact of the Coronavirus Disease 2019 (COVID-19) on global trade as well as the closure of Jamaica's largest alumina refinery in September 2019. Measures implemented across countries to stem the spread of the virus, led to a decline in the consumption and production of goods and services, disrupted logistical operations and ultimately negatively affected trade. A greater decline in expenditure on imports relative to a fall in revenue from exports, resulted in an improvement in Jamaica's trade deficit to US\$3 493.6 million compared with US\$4 750.3 million recorded in 2019. A contraction in the value of Fuels & Lubricants imported (owing to a fall in energy prices) largely accounted for the decline in import value, while a reduction in Alumina exports led to the fall in total export revenue. The United States of America (USA) continued to be Jamaica's top trading partner, accounting for 39.3 per cent of imports and 46.6 per cent of exports.

There was an improvement in Jamaica's balance on the current and capital account, which resulted in a net borrowing position of US\$74.9 million relative to US\$345.2 million for 2019. This improvement resulted from a smaller deficit recorded on the Current Account, outweighing the worsening deficit on the Capital Account.

Jamaica's trade performance mirrored downturns in global economic activity and trade. World output was estimated to have decreased by 3.3 per cent, and trade volume by 8.5 per cent.¹ The pandemic and the associated measures to contain the spread of the virus, created uncertainty as to how long the pandemic would last and the extent to which it would impact human lives. These unknowns were manifested in weakened business and consumer confidence, and changes in consumption patterns. Ultimately, many economies experienced reduced

trade activity, slowdowns in manufacturing, deterioration in the previously resilient service sectors, and increased fiscal expenditure.

Through existing coordination mechanisms, Jamaica continued to work with its CARICOM partners in addressing developments and challenges facing the Caribbean Community, thus facilitating the formulation of Community responses and policies. The impact of the pandemic and the need to address public health and economic effects, particularly the need for equitable access to vaccines and financing for economic recovery were among the main concerns addressed by CARICOM.

Remittance inflows increased by US\$499.4 million to US\$2 905.0 million driven primarily by transfers through Remittance Companies. The nominal exchange rate rose to \$142.65 per US\$1.00, representing a nominal depreciation of 7.6 per cent and a real depreciation of 3.7 per cent.

POLICIES AND PROGRAMMES

Export Growth

Work continued on strategies to expand Jamaica's export market. In this regard, the Ministry of Industry Investment and Commerce (MIIC) enhanced its efforts to facilitate expansion into new non-traditional markets and to maximise existing market access opportunities. Initiatives aimed at increasing exports included:

- Data Guided Market Analysis – Using data from the ASYCUDA World platform, markets with which Jamaica has trade agreements were assessed to determine where export volumes could be increased
- United Kingdom Trade Partnership Programme (UKTP) – Through partnership with the International Trade Centre, the MIIC worked towards the implementation of the UKTP. This initiative was geared towards assisting African, Caribbean and Pacific (ACP) countries to take advantage of the duty-free and quota-free access to United Kingdom and European Union

1. World Economic Outlook, April 2021, International Monetary Fund.

markets, entitled to under the Economic Partnership Agreements.

CARICOM Single Market and Economy (CSME)

Despite financial and human resource constraints, Heads of Government continued work geared towards enhancing the implementation of the CSME. Against this background, Jamaica offered assistance to Member States in building technical and vocational education and training capacity.

Recognising the benefit of having the public sector, private sector and civil society actively participating in the process of implementation, the CARICOM Private Sector Organisation and the Caribbean Community signed a Memorandum of Understanding (MOU) to collaborate on the full implementation of the CSME. This MOU is geared towards establishing a more structured engagement between the Community and the private sector to facilitate the full realisation of regional integration.

Council for Trade and Economic Development (COTED)

The 50th meeting of COTED was held, during which the Ministers with responsibility for Trade in the region approved a strategy to re-open economies within CARICOM which were closed due to COVID-19. The strategy proposed a phased relaxation of measures determined by the risk profile of each country. Additionally, the strategy recommended, at the national level, the establishment of a national consultative commission (both public and private

sector) to guide the rejuvenation of economic activity, as well as to establish minimum standards which must be attained prior to relaxation of the COVID-19 restrictions.

CARIFORUM–EU Economic Partnership Agreement (EPA)

Efforts to complete the 2nd review of the CARIFORUM-EU Economic Partnership Agreement (EPA) were advanced during the year. The review aims to determine the impact of EPA on the participating countries, through assessing the extent to which the objectives of the Agreement were met; the costs and consequences of implementation; the extent to which the Agreement is relevant to addressing current trade and development issues; and coherence with other policies. The final report is to be completed in 2021.

PERFORMANCE

BALANCE OF PAYMENTS

Jamaica's balance on the Current Account and Capital Account improved to a net borrowing position of US\$74.9 million compared with US\$345.2 million recorded during 2019. This out-turn reflected a US\$274.5 million improvement in the Current Account balance which outweighed the US\$4.1 million worsening in the deficit on the Capital Account (Table 6.1).

The deficit on the Current Account narrowed to US\$44.1 million from US\$318.5 million a year earlier, reflecting a fall in outflows which outpaced the decline in inflows

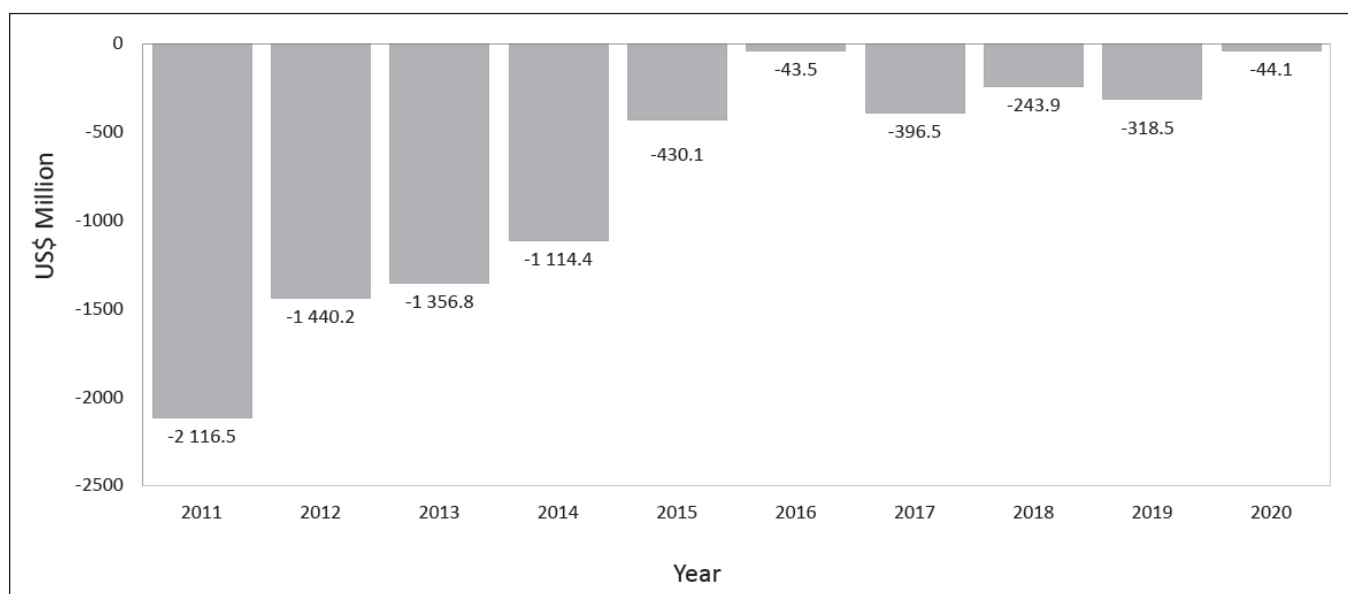


FIGURE 6A: CURRENT ACCOUNT DEFICIT, 2011–2020 (US\$ Million)

TABLE 6.1
BALANCE OF PAYMENTS ACCOUNTS 2019, 2020
(US\$MILLION)

	2019	2020	2020/2019 Absolute Change
Current Account Balance	- 318.5	- 44.1	274.5
Credits	8 986.6	6 884.7	-2 101.9
Debits	9 305.1	6 928.7	-2 376.4
Goods & Services	-2 329.3	-2 479.7	- 150.4
Credits	5 924.2	3 347.2	-2 577.0
Debits	8 253.6	5 826.9	-2 426.7
Goods	-4 036.1	-2 885.9	1 150.2
Exports	1 588.0	1 201.6	- 386.4
Imports	5 624.0	4 087.4	-1 536.6
Services	1 706.7	406.1	-1 300.6
Credits	4 336.2	2 145.6	-2 190.7
Debits	2 629.5	1 739.4	- 890.1
Primary Income	- 405.6	- 525.8	- 120.2
Credits	380.1	345.4	- 34.7
Debits	785.8	871.2	85.5
Secondary Income	2 416.4	2 961.5	545.0
Credits	2 682.3	3 192.1	509.8
Debits	265.8	230.6	- 35.2
Capital Account	- 26.7	- 30.8	- 4.1
Credits	22.3	18.3	- 3.9
Debits	48.9	49.1	.2
Net lending (+) / net borrowing (-) (balance from current and capital account)	- 345.2	- 74.9	270.3
Financial Account			
Net lending (+) / net borrowing (-) (balance from financial account)	- 595.7	- 111.8	483.9
Direct Investment	- 219.4	- 258.4	- 39.0
Net acquisition of financial assets	446.0	6.7	- 439.3
Net incurrence of liabilities	665.4	265.1	- 400.3
Portfolio Investments	- 607.7	- 266.2	341.5
Net acquisition of financial assets	- 115.4	- 177.5	- 62.1
Net incurrence of liabilities	492.2	88.7	- 403.5
Financial derivatives	- 135.8	24.0	159.8
Net acquisition of financial assets	- 89.0	.8	88.1
Net incurrence of liabilities	46.8	- 24.8	- 71.7
Other Investments	268.2	- 60.4	- 328.5
Net acquisition of financial assets	318.9	281.4	- 37.5
Net incurrence of liabilities	50.8	341.8	291.0
Reserves Assets	99.0	449.1	
Net Errors and Omissions	- 250.5	- 37.0	

Discrepancies in table due to rounding

Source: Bank of Jamaica

(Figure 6A). The narrowing of the deficit represented an improvement in the surplus of the Secondary Income sub-account as both the Goods & Services and Primary Income sub-accounts deteriorated (see Table 6.1). The surplus on the Secondary Income sub-account grew by US\$545.0 million to US\$2 961.5 million, due mainly to an increase in remittances.

The deficit on the Goods & Services sub-account totalled US\$2 479.7 million compared with US\$2 329.3 million in 2019. There was a deterioration in the Services trade balance, which resulted from a reduction in export earnings from global services, tourism and transportation due to the implementation of travel restrictions and physical distancing measures to curtail the spread of COVID-19. Spending

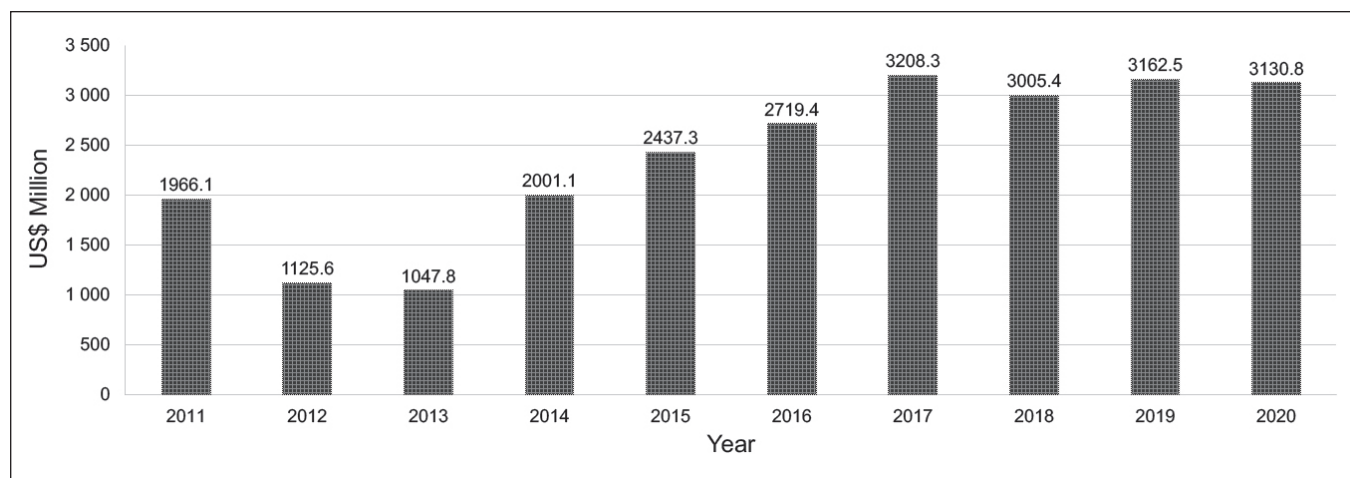


FIGURE 6B: STOCK OF NET INTERNATIONAL RESERVES, US\$ MILLION, 2011–2020

on goods imports fell more than income earned from the export of goods. The lower value of Goods imports reflected lower imports of all categories of goods, primarily fuels and lubricants. The Primary Income sub-account recorded a deficit of US\$525.8 million, which was US\$120.2 million worse than in 2019. This deterioration mainly reflected a reduction in payments to Jamaicans received from abroad.

An improvement was registered on the Financial Account, which recorded a net borrowing balance of US\$111.8 million compared with US\$595.7 million. Responsible for this out-turn were higher balances on the Portfolio Investments and Financial Derivatives sub-accounts. The improvement in the Portfolio Investments sub-account occurred as the decline in debt security liabilities was greater than the decline in debt securities assets. The higher balance on the Financial Derivatives sub-account was primarily due to the combined effect of a rise in the financial assets and a reduction in financial liabilities held by deposit-taking institutions (excluding the Central Bank).

Net financial inflows were able to finance the net borrowing balance on the Current and Capital Accounts, resulting in US\$449.1 million being held in reserves. This compared with US\$99.0 million worth of reserves in 2019.

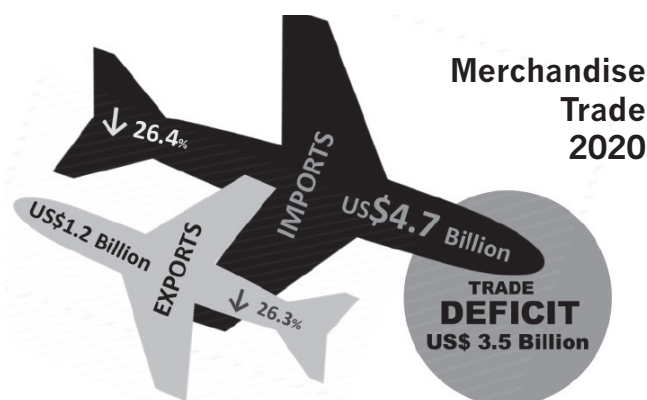
International Reserves

The stock of Net International Reserves was US\$3 130.79 million, as at December 2020, compared with US\$3 162.5 million at the end of 2019 (Figure 6B). The fall was attributed to an increase in liabilities, which outweighed the increase in Total Foreign Assets. The rise in Foreign Liabilities stemmed from increased liabilities to the International Monetary Fund reflecting emergency funds (SDR382.9 million or approximately US\$520.0 million) received under the Rapid Financing Instrument. Gross

International Reserves (GIR) was US\$4 085.8 million, the equivalent of an estimated 38.58 weeks of projected imports of goods and services. This was relative to GIR of US\$3 631.1 million for the period ending December 2019 and representing 22.94 weeks of projected imports of goods and services.

EXTERNAL TRADE

Merchandise Trade



Total Merchandise Trade was valued at US\$5 931.1 million relative to US\$8 056.5 million recorded for 2019. This reduction in trade activity resulted from the impact of measures implemented to stem the spread of the COVID-19 disease. Border closures, curfews, and social distancing measures affected both the demand and supply of merchandise goods. There was a decline in both export receipts, by US\$434.4 million to US\$1 218.7 million, and spending on imports, by US\$1 691.0 million to US\$4 712.4 million. As a consequence of the absolute change in import expenditure declining by more than the absolute fall in export receipts, Jamaica's trade deficit with the rest of the

TABLE 6.2
MERCHANDISE TRADE BY SITC SECTION, 2019, 2020
(US\$ MILLION)

	2019 ^r			2020 ^p			2020/2019			
	Imports	Exports	Balance	Imports	Exports	Balance	Absolute Change	Per Cent Change		
							Imports	Exports	Imports	Exports
Total Merchandise Trade	6 403.4	1 653.1	-4 750.2	4 712.4	1 218.7	-3 493.6	-1 691.0	-434.4	-26.4	-26.3
Of which Jamaica Free Zone	111.3	3.9	-107.3	212.9	93.9	-119.0	101.6	90.0	91.3	2 293.0
Of which Re-exports	n/ap	.1	n/ap	n/ap	.1	n/ap	n/ap	-.1	n/ap	-60.8
Food	1 025.6	220.1	-805.6	932.6	238.5	-694.1	-93.0	18.5	-9.1	8.4
Beverages and Tobacco	84.5	134.2	49.7	54.5	128.0	73.5	-29.9	-6.2	-35.5	-4.6
Crude Materials (excluding Fuels)	66.8	822.7	756.0	73.3	531.7	458.3	6.6	-291.1	9.9	-35.4
Mineral Fuels, etcetera	1 726.7	375.2	-1 351.5	884.2	239.6	-644.5	-842.5	-135.6	-48.8	-36.1
Animal & Vegetable Oils and Fats	35.8	.4	-35.4	36.5	.7	-35.8	.7	.3	1.9	89.0
Chemicals	654.9	36.6	-618.3	571.2	35.2	-536.0	-83.7	-1.4	-12.8	-3.9
Manufactured Goods	774.1	13.1	-761.0	629.4	12.1	-617.3	-144.7	-.9	-18.7	-7.1
Machinery and Transport Equipment	1 464.3	30.2	-1 434.1	1 111.9	14.9	-1 097.0	-352.4	-15.3	-24.1	-50.6
Misc. Manufactured Articles	570.6	16.0	-554.6	418.6	14.3	-404.3	-152.0	-1.7	-26.6	-10.6
Other	.1	4.7	4.6	.1	3.7	3.6	-.1	-1.0	-41.8	-21.8

Discrepancies in table due to rounding

n/ap- not applicable

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

world improved to US\$3 493.6 million from US\$4 750.3 million (Table 6.2).

Merchandise Imports

Expenditure on Merchandise Imports totalled US\$4 712.4 million, a decline of 26.4 per cent (Figure 6C). This decline stemmed from lower spending in eight of 10 Standard International Trade Classification (S.I.T.C.) sections, and

was consistent with lower domestic economic activity and commodity prices. The largest decline was recorded for the section Mineral Fuels, etcetera, which fell by US\$842.5 million (see Table 6.2). The lower expenditure on Mineral imports reflected a decline in international crude oil prices caused by a slowing in demand and increased supply. Other categories for which lower spending was recorded included: Machinery and Transport Equipment (down US\$352.4 million to US\$1 111.9 million); Miscellaneous

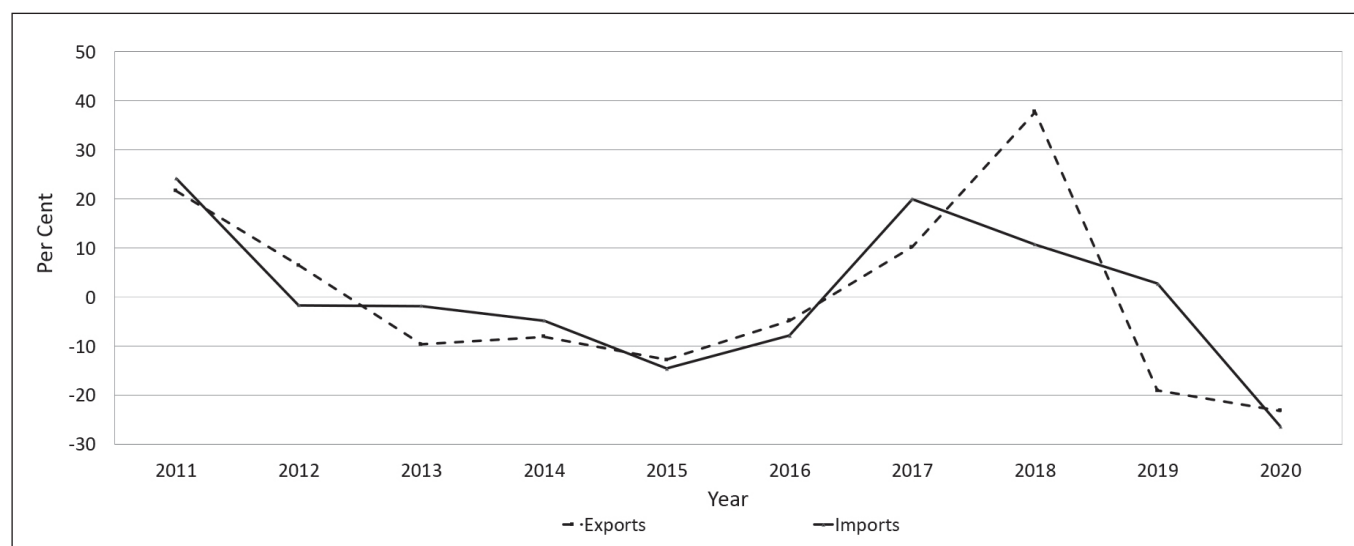


FIGURE 6C: GROWTH IN MERCHANDISE EXPORTS AND IMPORTS (%) 2011-2020

TABLE 6.3
IMPORTS BY ECONOMIC FUNCTION, 2019, 2020
(US\$ MILLION)

END-USE CATEGORIES	2019 ^r	2020 ^p	2020/2019	
			Absolute Change	Per Cent Change
TOTAL	6 403.4	4 712.4	-1 691.0	-26.4
	0.0			
Consumer Goods	1 573.5	1 349.8	- 223.7	- 14.2
Food (incl. Beverages) Mainly for Household Consumption	849.1	740.9	- 108.2	- 12.7
Non-Durable Goods	361.9	334.9	- 27.0	- 7.5
Semi-Durable Goods	189.3	135.8	- 53.5	- 28.3
Durable Goods	173.2	138.3	- 35.0	- 20.2
Raw Materials/Intermediate Goods	1 858.4	1 540.0	- 318.4	- 17.1
Food (incl. Beverages) Mainly for Industry	147.1	148.9	1.8	1.3
Industrial Supplies	993.3	802.3	- 191.1	- 19.2
Construction Materials	434.2	375.3	- 58.9	- 13.6
Parts and Accessories of Capital Goods (except Transport Equip.)	283.7	213.4	- 70.2	- 24.8
Fuels and Lubricants	1 727.2	883.6	- 843.6	- 48.8
Crude Oil	642.7	384.9	- 257.9	- 40.1
Motor Spirit	245.3	128.6	- 116.6	- 47.6
Other Fuels and Lubricants	839.2	370.1	- 469.1	- 55.9
Transport Equipment	518.8	372.8	- 146.1	- 28.2
Passenger Motor Vehicles	373.6	264.2	- 109.4	- 29.3
Parts and Accessories of Transport Equipment	137.0	102.1	- 34.9	- 25.5
Non-industrial Transport Equipment	8.3	6.5	- 1.7	- 20.8
Capital goods (except Non-Industrial Transport Equipment)	722.8	564.7	- 158.1	- 21.9
Capital Goods (except Transport Equipment)	583.5	438.0	- 145.6	- 24.9
Industrial Transport Equipment	139.2	126.7	- 12.5	- 8.9
Goods not elsewhere specified	2.7	1.4	- 1.3	- 46.6

p – preliminary
r – revised

Source: Compiled from data from the Statistical Institute of Jamaica

Manufactured Articles (down US\$152.0 million to US\$418.6 million); and Manufactured Goods (down US\$144.7 million to US\$629.4 million). The decline in spending on imports was tempered by respective increases of US\$6.6 million and US\$0.7 million in Crude Materials (excluding Fuels) and Animal & Vegetable Oils & Fats.

An analysis of Imports classified by end-use indicated that of the six categories, expenditure was largely allocated to Raw Materials/Intermediate Goods, Fuels

and Lubricants and Consumer Goods, which combined accounted for 80.1 per cent of total imports. The largest absolute reduction in import value was recorded for Fuels and Lubricants, down US\$843.6 million to US\$883.6 million, reflecting the combined effect of lower imports of refined petroleum, bunker C fuel oil and motor spirits (Table 6.3). Expenditure on imports for Raw Material/Intermediate Goods was valued at US\$1.5 billion, a decline of US\$318.4 million. All sub-categories in this group, with

the exception of Food, declined, with the greatest absolute change of US\$191.1 million in Industrial Supplies, which was due to reduced imports of inorganic chemicals and articles of paper and paperboard.

Imports of Consumer Goods fell by US\$223.7 million to US\$1 349.8 million. This was due in part to lower Food imports, particularly beverages, meat and meat preparations, reflecting in part lower demand from the Hotels and Restaurants industry. Also contributing to the decline in Consumer Goods were lower imports of printed books and cigarettes containing tobacco (captured under the category Semi-Durable Goods); apparel, clothing accessories, miscellaneous manufactured goods (categorized under Durable Goods); and jewellery, furniture (categorized under Durable Goods).

During the year, Jamaica's largest import partner was the USA, from which 39.3 per cent of imports was sourced. This was followed by China (8.3 per cent), Brazil (6.5 per cent), Japan (4.4 per cent), and Trinidad & Tobago (2.9 per cent).

Merchandise Exports

The revenue earned from Merchandise Exports was US\$1 218.7 million and was 26.3 per cent less than that received during 2019. Free Zone as a share of total exports increased to 7.7 per cent compared with 0.2 per cent, in 2019.

The decline in exports reflected a reduction in the value of exports recorded for eight of 10 SITC sections. The largest decline was from Crude Materials (excluding Fuels), down 35.4 per cent to US\$531.7 million, due largely to lower exports of alumina as a result of the temporary closure of JISCO Alpart in September 2019. Other sections which contributed to decreased export earnings were Mineral Fuels, et cetera which fell by 36.1 per cent to US\$239.6 million and Machinery & Transport Equipment, which declined by 50.6 per cent to US\$14.9 million. Food and Animal & Vegetable Oils & Fats were the two sections that registered an increase in export earnings due to higher export of the components 'coffee, tea, cocoa, spices, and manufactures thereof' and 'miscellaneous edible products and preparations'.

Traditional Domestic Exports

Valued at US\$597.3 million, Total Traditional Exports accounted for 51.3 per cent of the total Domestic Exports. This value was 32.9 per cent lower than that recorded in 2019 and reflected lower earnings of 35.9 per cent and 9.6 per cent in Mining & Quarrying and Manufacture exports, respectively (Table 6.4). Consequent on lower export earnings from alumina and bauxite, due to decreased capacity utilization at alumina plants, Mining & Quarrying earnings, which accounted for 86.1 per cent

of Total Traditional Exports, fell by US\$288.2 million to US\$514.4 million. The decrease in Manufacture earnings (by US\$6.8 million to US\$64.3 million) was due to lower receipts from sugar, rum, citrus and coffee products.

A further contraction in Traditional Domestic Export earnings was stymied by increased Agriculture earnings, up 15.4 per cent to US\$18.5 million (see Table 6.4). Coffee earnings, which accounted for 78.8 per cent of the category, increased by 32.7 per cent to US\$15.9 million. Earnings from banana (up 25.6 per cent to US\$0.7 million) also increased. These outweighed lower earnings from citrus, cocoa and pimento.

Non-Traditional Domestic Exports

Non-Traditional Domestic Exports earnings fell by 9.3 per cent to US\$567.8 million. This out-turn, reflected reduced income from Crude Materials, down by 15.5 per cent to US\$16.7 million; and Other, down by 22.6 per cent to US\$270.3 million (see Table 6.4). Combined, these two categories accounted for 50.5 per cent of Non-Traditional Domestic Exports and outweighed a rise in Food export earnings. Accounting for the lower earnings in Crude Materials was the decline in the value of limestone and waste & scrap metals. Within the category Other, lower earnings resulted from a decline in export receipts from six of eight sub-categories. Among these were Mineral Fuels, etcetera, Machinery & Transport Equipment, Manufactured Goods, and Wearing Apparel.

The value of non-traditional Food exports increased by 12.1 per cent to US\$207.4 million. Among the food items contributing to higher export earnings were Sauces (up 23.7 per cent to US\$29.7 million); Yams (up 24.3 per cent to US\$37.4 million); Baked Products (up 13.8 per cent to US\$25.3 million); and Dairy Products & Bird Eggs (up 17.7 per cent to US\$9.8 million).

Trade with CARICOM

Jamaica's merchandise trade balance with CARICOM was a deficit of US\$177.1 million (Table 6.5). This was an improvement relative to a deficit of US\$208.4 million recorded in 2019. Accounting for this improvement was a US\$49.2 million fall in the value of imports from the region, which outweighed the US\$17.9 million decrease in the value of exports to the region.

Merchandise import expenditure declined to US\$253.4 million, reflecting lower expenditure on imports from six of 10 S.I.T.C. sections. The largest declines were for Mineral Fuels, etcetera (by US\$24.5 million); Food (by US\$16.1 million); and Beverages & Tobacco (US\$7.7 million).

The value of exports to the region totalled US\$76.3 million. Contributing to this was lower earnings from eight of the 10 sections. Food, which accounts for the largest share of export earnings, decreased by US\$6.8

TABLE 6.4
TRADITIONAL & NON-TRADITIONAL EXPORTS, 2019-2020
(US\$ '000)

	2019	2020	2020/2019	
			Absolute Change	Per Cent Change
TOTAL TRADITIONAL EXPORTS	889 864.0	597 292.8	-292 571.2	- 32.9
Agriculture	16 068.0	18 546.2	2 478.2	15.4
Banana	578.0	726.0	148.0	25.6
Citrus	815.5	383.3	- 432.2	- 53.0
Coffee	11 940.3	15 850.0	3 909.6	32.7
Cocoa	454.1	348.2	- 105.9	- 23.3
Pimento	2 280.0	1 238.8	-1 041.2	- 45.7
Mining and Quarrying	802 613.0	514 406.6	-288 206.4	- 35.9
Bauxite	95 839.0	88 614.2	-7 224.8	- 7.5
Alumina	706 774.0	425 792.3	-280 981.7	- 39.8
Gypsum	0.0	0.1	0.1	0.0
Manufacture	71 182.0	64 340.0	-6 842.0	- 9.6
Sugar	10 173.9	6 500.3	-3 673.6	- 36.1
Rum	55 975.8	54 497.2	-1 478.6	- 2.6
Citrus Products	206.4	127.1	- 79.2	- 38.4
Coffee Products	4 196.9	2 575.7	-1 621.2	- 38.6
Cocoa Products	630.0	639.7	9.7	1.5
TOTAL NON-TRADITIONAL EXPORTS	626 284.0	567 765.5	-58 518.5	- 9.3
Food:	185 081.0	207 397.4	22 316.4	12.1
Pumpkins	318.0	352.8	34.8	10.9
Other Vegetables & Preparations thereof	2 840.0	2 166.3	- 673.7	- 23.7
Dasheen	1 854.1	1 785.6	- 68.4	- 3.7
Sweet Potatoes	3 813.0	4 341.0	528.0	13.8
Yams	30 059.7	37 363.3	7 303.6	24.3
Papayas	1 985.7	731.3	-1 254.5	- 63.2
Ackee	20 219.0	21 661.2	1 442.2	7.1
Other Fruits & Fruit Preparations	5 910.0	5 471.0	- 439.0	- 7.4
Meat & Meat Preparations	8 689.0	9 422.0	733.0	8.4
Dairy Products & Bird's Eggs	8 332.0	9 804.5	1 472.5	17.7
Fish, Crustaceans & Molluscs	9 715.0	10 503.1	788.1	8.1
Baked Products	22 244.0	25 322.1	3 078.1	13.8
Juices excluding Citrus	10 140.0	10 449.8	309.8	3.1
Animal Feed	7 977.4	5 102.3	-2 875.1	- 36.0
Sauces	24 032.0	29 734.2	5 702.2	23.7
Other Food Exports	26 952.0	33 186.9	6 234.9	23.1
Beverages & Tobacco (excl. Rum):	72 148.0	73 441.2	1 293.2	1.8
Non-Alcoholic Beverages	17 224.0	18 651.3	1 427.3	8.3
Alcoholic Beverages (excl. Rum)	54 416.0	54 788.3	372.3	.7
Tobacco	507.0	2.0	- 505.0	n/ap
Crude Materials:	19 713.0	16 651.1	-3 061.9	- 15.5
Limestone	3 608.7	3 451.3	- 157.3	- 4.4
Waste and Scrap Metals	11 584.8	7 911.5	-3 673.3	- 31.7
Other Crude Materials	4 520.0	5 288.3	768.3	17.0
Other:	349 342.0	270 275.7	-79 066.3	- 22.6
Mineral Fuels, etcetera	297 071.0	220 259.7	-76 811.3	- 25.9
Animal & Vegetable Oils & Fats	291.0	343.2	52.2	17.9
Chemicals (incl. Ethanol)	31 624.0	29 885.7	-1 738.3	- 5.5
Manufactured Goods	8 602.0	7 070.9	-1 531.1	- 17.8
Machinery and Transport Equipment	5 756.0	2 575.6	-3 180.4	- 55.3
Wearing Apparel	1 680.0	897.9	- 782.1	- 46.6
Furniture	747.0	290.3	- 456.7	- 61.1
Other Domestic Exports	3 715.2	8 952.5	5 237.3	141.0
TOTAL DOMESTIC EXPORTS	1 516 148.0	1 165 058.3	-351 089.7	- 23.2
Re-exports	137 000.0	53 700.0	-83 300.0	- 60.8
TOTAL EXPORTS	1 653 148.0	1 218 758.3	-434 389.7	- 26.3

Discrepancies in table due to rounding

n/ap – not applicable

p – preliminary

r – revised

TABLE 6.5
MERCHANDISE TRADE WITH CARICOM BY SITC SECTION, 2019, 2020
 (US\$ '000)

S.I.T.C. SECTIONS	2019 ^r			2020 ^p			2020/2019 Absolute Change	
	Imports	Exports	Balance	Imports	Exports	Balance	Imports	Exports
All Sections	302 683.0	94 249.0	- 208 434.0	253 435.0	76 308.0	- 177 127.0	- 49 248.0	- 17 941.0
Of which Jamaica Free Zone	518.0	4 452.0	3 934.0	598.0	3 090.0	2 492.0	80.0	- 1 362.0
Of which Re-exports	n/ap	14 272.0	n/ap	n/ap	8 493.0	n/ap	n/ap	-5779.0
Food	148 992.0	34 586.0	- 114 406.0	132 917.0	27 785.0	- 105 132.0	- 16 075.0	- 6 801.0
Beverages & Tobacco	32 919.0	20 487.0	- 12 432.0	25 209.0	14 073.0	- 11 136.0	- 7 710.0	- 6 414.0
Crude Materials (excl. Fuels)	668.0	887.0	219.0	621.0	881.0	260.0	- 47.0	- 6.0
Mineral Fuels, etcetera	44 328.0	14 233.0	- 30 095.0	19 821.0	15 425.0	- 4 396.0	- 24 507.0	1 192.0
Animal & Vegetable Oils & Fats	3 694.0	77.0	- 3 617.0	3 446.0	115.0	- 3 331.0	- 248.0	38.0
Chemicals	23 844.0	11 378.0	- 12 466.0	23 867.0	10 129.0	- 13 738.0	23.0	- 1 249.0
Manufactured Goods	21 084.0	5 235.0	- 15 849.0	18 017.0	4 368.0	- 13 649.0	- 3 067.0	- 867.0
Machinery and Transport Equip.	7 351.0	2 666.0	- 4 685.0	9 268.0	778.0	- 8 490.0	1 917.0	- 1 888.0
Misc. Manufactured Articles	19 803.0	3 987.0	- 15 816.0	20 268.0	2 553.0	- 17 715.0	465.0	- 1 434.0
Other	0.0	713.0	713.0	0.0	190.0	190.0	0.0	- 523.0

Discrepancies due to rounding
 n/ap – not applicable
 p – preliminary
 r – revised

Source: Statistical Institute of Jamaica

million to US\$27.8 million. The section recording the second largest decrease in earnings was Beverages & Tobacco, which fell by US\$6.4 million to US\$14.1 million. Re-exports to the region declined by 40.5 per cent to US\$8.5 million due primarily to the fall in earnings from the re-export of Mineral Fuels, etcetera.

REMITTANCES

Net remittance inflows totalled US\$2 678.8 million, an increase of 25.0 per cent relative to 2019. The increase resulted from a rise in inflows by US\$499.4 million to US\$2 905.0 million in tandem with the US\$36.6 million decline in outflows to US\$226.2 million (Table 6.6). The increase in inflows occurred primarily through Remittance companies, which recorded a 24.0 per cent growth to US\$2 489.1 million and was supported by a 4.2 per cent rise to US\$415.8 million in Other Remittances.

The United States of America continued to be largest source of remittance inflows totalling US\$1 686.4 million and accounting for 58.2 per cent. This share was 4.1 percentage points lower than that recorded for 2019. The second largest sum of inflows was received was the United Kingdom (US\$270.9 million) followed by Canada (US\$257.5 million) and Cayman Islands (US\$145.3 million). Combined these four countries accounted for 81.4 per cent of remittance inflows, relative to 78.4 per cent in 2019.

FOREIGN EXCHANGE MARKET

The nominal exchange rate was \$142.65 to US\$1 at the end of December relative to \$132.57 at the end of 2019. This change in the exchange rate represented a nominal depreciation of 7.6 per cent and a real depreciation of 3.7 per cent. Despite the overall depreciation, trends in the foreign exchange market throughout the year indicated two-way movements in the exchange rate (Figure 6E). The BOJ continued to ensure the effective functioning of the market through providing US dollar liquidity via its Bank of Jamaica Foreign Exchange Trading Tool (B-FXITT) facility.

TABLE 6.6
JAMAICA'S REMITTANCE INFLOWS 2019, 2020
 (US\$ MILLION)

Main Channels of Remittances	2019 ^r		2020 ^p		2020/2019	
	2019 ^r	2020 ^p	Absolute Change	Per Cent Change	Absolute Change	Per Cent Change
Remittance Companies	2 006.6	2 489.1	482.5	24.0		
Other Remittances	398.9	415.8	16.9	4.2		
Total Inflows	2 405.6	2 905.0	499.4	20.8		
Total Outflows	262.8	226.2	-36.6	-13.9		
Net Remittances	2 142.8	2 678.8	536.0	25.0		

Discrepancies in table due to rounding
 p – preliminary
 r – revised

Source: Bank of Jamaica

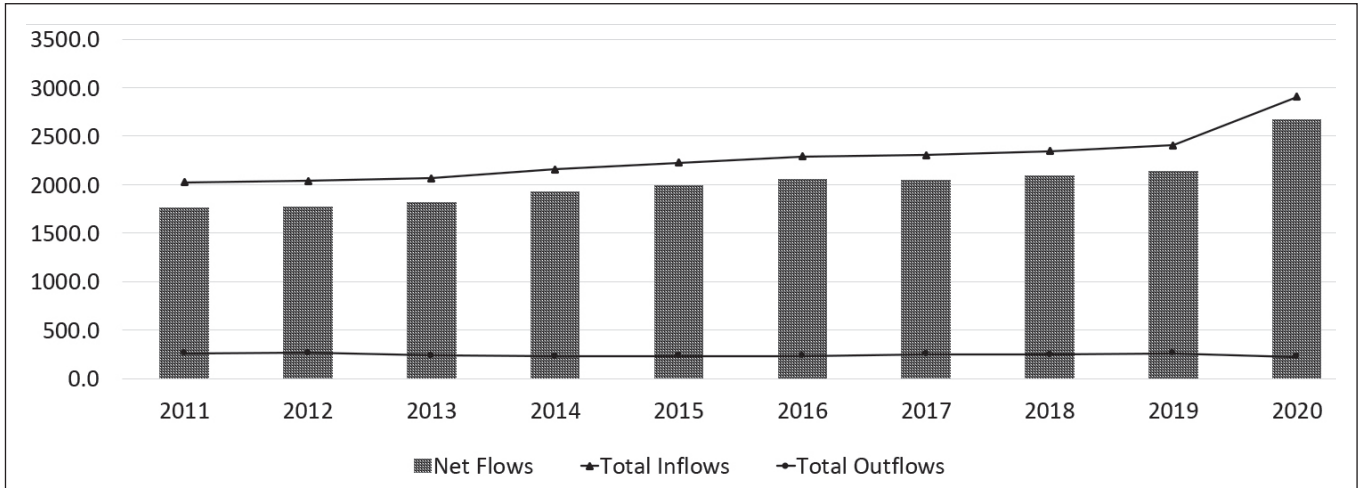


FIGURE 6D: ANNUAL REMITTANCE INFLOWS & OUTFLOWS, 2011-2020

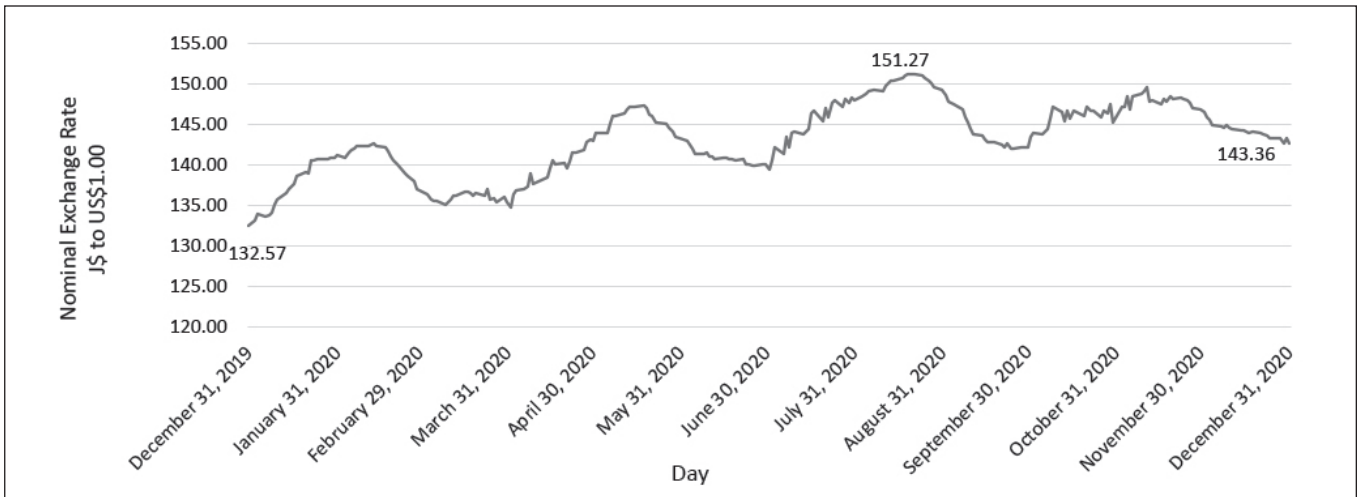


FIGURE 6E: DAILY NOMINAL DAILY EXCHANGE RATES (US\$ Selling Rate), 2020

OUTLOOK

Global output is expected to increase by 6.0 per cent in 2021. This performance is predicated on continued vaccination distribution and associated reduction in COVID-19 containment measures. These developments, combined with fiscal stimuli, particularly in Advanced Economies, are expected to slow the impact of the pandemic, increase consumer and business confidence and engender growth. Economic activity in both Advanced Economies and Emerging Market & Developing Economies is projected to grow by 5.1 per cent and 6.7 per cent, respectively. This augurs well for global trade of goods and services, which is forecast to grow by 8.4 per cent.

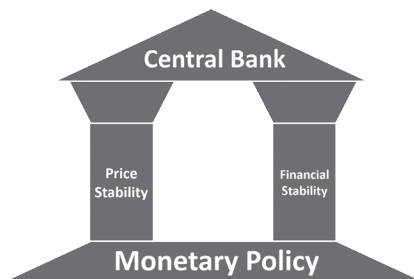
These projected improvements in the global economy as well as a general improvement in macroeconomic

conditions domestically are anticipated to positively impact Jamaica’s external trade performance. Jamaica’s trade performance is also expected to be supported by several programmes aimed at increasing exports. Among these are the Economic Diplomacy Programme, which includes marketing and engagement activities that will also enhance Jamaica’s presence internationally. Furthermore, connectivity between port and terminal operators, customs offices, other regulatory agencies, and traders will be improved through the use of the recently implemented Jamaica Electronic Single Window. This platform allows importers and exporters to lodge documents electronically and facilitate the exchange of information between government agencies and traders. It will reduce traders’ points of contact from as many as five entities to one single agency, saving time and the costs per transactions. ■

MONEY AND INFLATION

INTRODUCTION

The overarching framework of the Government of Jamaica’s (GOJ’s) macroeconomic programme rested on the pillars of price and financial stability. These shaped the Bank of Jamaica’s (BOJ’s) monetary policy directives, which targeted inflation remaining within 4.0 per cent–6.0 per cent. The Central Bank considered this level of inflation compatible with a stable and competitive macroeconomic environment that engenders economic growth and increased employment.



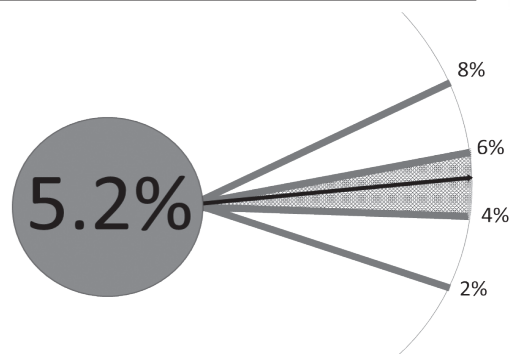
Signalling its commitment to an expansionary monetary policy, the BOJ maintained its policy rate¹ at 0.50 per cent throughout the year. This occurred within the context of the adverse effects of the Coronavirus Disease 2019 (COVID-19) which caused a decline in economic activity both domestically and internationally. The shock to the

economy led to eight measures being implemented by the Central Bank to maintain adequate levels of liquidity within the economy. Three of these were foreign currency measures with the remaining five addressing the Jamaican currency. In addition to these measures the Central Bank also reduced the cash reserve requirement of deposit-taking institutions (DTIs) for local and foreign currency.

Among the Jamaican currency measures was the removal of limits on funds that can be borrowed overnight by deposit-taking institutions (DTIs) under the Standing Liquidity Facility (SLF).² Funds borrowed in excess of these limits were previously charged at the Excess Funds Rate³. DTIs are now only limited by collateral in their access to funds at the SLF rate.

The Central Bank forecasted that 12-month point-to-point inflation would remain within the lower half of the target range of 4.0 per cent to 6.0 per cent throughout the year. There was one deviation to this forecast in the month of June.

12 Month Point-to-Point Inflation



For 2020 point-to-point inflation was 5.2 per cent. This increase in the general level of prices emanated mainly from:

- adverse weather conditions which negatively affected agricultural production especially for vegetables and starchy foods

Policy Rate

0.50%

Remained unchanged for the year.

Cash Reserve Requirement

Reduced 2.0 percentage points for both local and foreign currency.

5.0%

1. The BOJ’s policy rate is the interest rate on overnight balances of deposit-taking institutions held at the BOJ.
2. The Standing Liquidity Facility is the BOJ’s overnight standard interest rate on lending to depository corporations.
3. The Excess Funds Rate is the rate at which DTIs access overnight liquidity for amounts in excess of their individual SLF limit. The interest rate is the SLF limit + 4.0 percentage points.

- increased electricity rates associated with higher fuel and billing exchange rates in electricity bills.

This out-turn was moderated by declining international oil prices for crude oil which affected transport related items as well as constrained domestic demand associated with the impact of COVID-19 and the measures implemented to minimize its spread.

The Statistical Institute of Jamaica introduced the revised Consumer Price index in April 2020 based on the Household Expenditure Survey (HES) conducted in 2017.

The weighted average selling rate of the United States dollar at the end of 2020 was \$142.65 per US\$1.00, representing a nominal depreciation of 7.6 per cent and a real depreciation of 3.7 per cent. This was attributed to decreased supply in foreign currency caused by reduced earnings from exports, particularly from tourism, traditionally Jamaica's leading export earner. Lower foreign currency inflows from tourism was due to the onset of the COVID-19 pandemic and restrictions on international travel.

MONETARY POLICY FRAMEWORK

The main objective of the BOJ's monetary policy is to maintain price stability. Towards this end, monetary policy is executed under an Inflation Targeting regime with a continuous medium term inflation target range of 4.0 per cent–6.0 per cent. The Bank's performance is evaluated based on the movement of the 12-month point-to-point inflation rate in relation to this target range. To maintain inflation within the target, the Central Bank uses monetary tools, with the primary instruments being the policy interest rate, that is, the rate on overnight balances in the current accounts of DTIs at the BOJ. Adjustments to the policy rate reflect the Bank's assessment of future developments and its likely impact on the inflation target. These adjustments are then transmitted through the financial market in order to expand private sector credit and maximise economic growth and job creation.

The institutional framework of the BOJ was strengthened with the Senate's approval of the Bank of Jamaica (Amendment) Act, 2020 on December 4, 2020. It entrenches in law, autonomy of the Central Bank in the implementation of monetary policy and ensures transparency and accountability to the public. Accordingly the bank will make available on its website, any deviations from the inflation target and remedial actions outlined to bring inflation within the targeted range. Monetary policy decisions will be the purview of a Monetary Policy Committee which will include the views of external stakeholders. The minutes of the

meetings for this committee will be made available to the public. The Governor of the Bank will also be required on designated occasions to present before the Standing Finance Committee in Parliament on the Central Bank's operations. Under the Act a system of staggered board appointments to the Central Bank will be introduced to ensure that an entire board cannot be replaced during a single term by a government administration to ensure autonomy. The legislation also provides for adequate capitalization of the BOJ and prevents fiscal dominance by restricting conditions under which the GOJ may borrow money from the Central Bank (i.e. only in the case of a national emergency).

The BOJ's thrust towards transparency included disseminating information on monetary policy decisions to the general public in a more culturally meaningful and understandable manner. This aims to increase the efficiency in the transmission mechanism to the financial market and private sector response to changes in the policy rate. The Central Bank's efforts were recognised on an international platform when it received the global award of "Best Communication Initiative Award" in the Central Banking Publications 7th central banking awards in February 2020. This award was in recognition of the BOJ's utilisation of reggae music in its communication strategy to simplify complex economic matters relating to inflation-targeting.

Further efforts to improve transparency led to developments in the foreign exchange market through the introduction of the pilot stage of its Foreign Exchange Trading Platform (FXTTP) in June 2020. This platform allows instantaneous electronic foreign exchange trading and viewing of trades for all authorized dealers, DTIs and cambios, for the US dollar and Jamaican dollar. Within the pilot only DTI's are allowed to trade while other traders (cambios and authorized dealers) may be observers. Observers will be able to see all daily trades in real time, which will help them make informed decisions when approaching the market to buy or sell foreign exchange. This platform is designed to facilitate direct inter-dealer trading among licensed foreign exchange (FX) traders.

The BOJ also enhanced the framework of the foreign exchange market by bringing into operation the FX Swap Arrangement on January 22, 2020. This instrument enables the Central Bank to sell US dollars to authorized dealers at an agreed spot rate,⁴ within a pre-determined limit, at the prevailing market rate, with an agreement to buy back the same total of US dollars at a time in the future at an agreed forward rate.

The BOJ continued to support a two-way directional movement in the exchange rate. Its policy stance is to

4. The spot rate is defined as the current midday rate plus a spread, based on the duration of the contract agreed on by the parties.

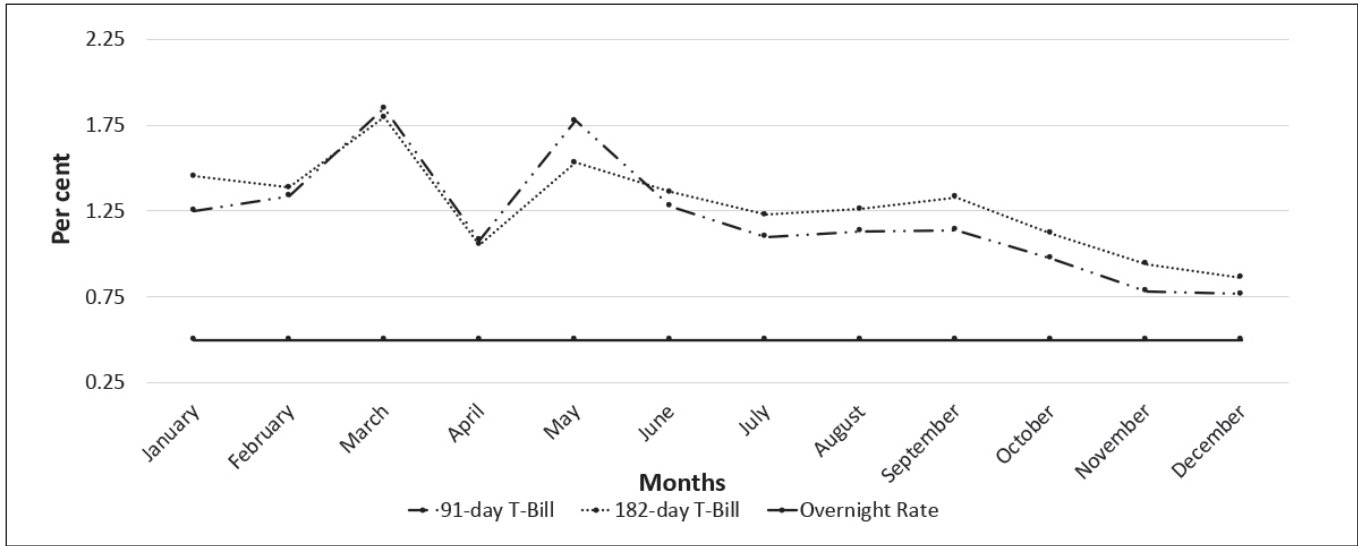


FIGURE 7A: MOVEMENTS IN INDICATIVE INTEREST RATES, 2020

intervene only when there are abnormal conditions which may cause shortfalls in foreign exchange liquidity and lead to excess volatility in the exchange rate. The main tool for intervention is the BOJ Foreign Exchange Intervention Trading Tool (B-FXITT), through which the Central Bank sold a combined total of US\$315.0 million using the sale option 15 times throughout the year.

Monetary Policy Management

Operating under an inflation-targeting regime, the BOJ pursued an accommodative monetary policy stance during the year. In line with this stance the Central Bank maintained the policy rate at 0.50 per cent (Figure 7A and

Table 7.1). This decision was made to support economic activity in the context of the impact of COVID-19 and the associated safety measures used to curtail its spread.

Based on its assessment the BOJ deemed that monetary conditions were conducive to the 12-month point-to-point inflation remaining within the target range of 4.0 per cent–6.0 per cent over the next two years. The 12-month point-to-point inflation rate remained within the target range for the majority of the year rising above the upper limit for the month of June (Figure 7B). The spike in June was mainly due to weather shocks caused by drought conditions, which led to a decline in agricultural output. Other factors included higher imported inflation due to depreciations in

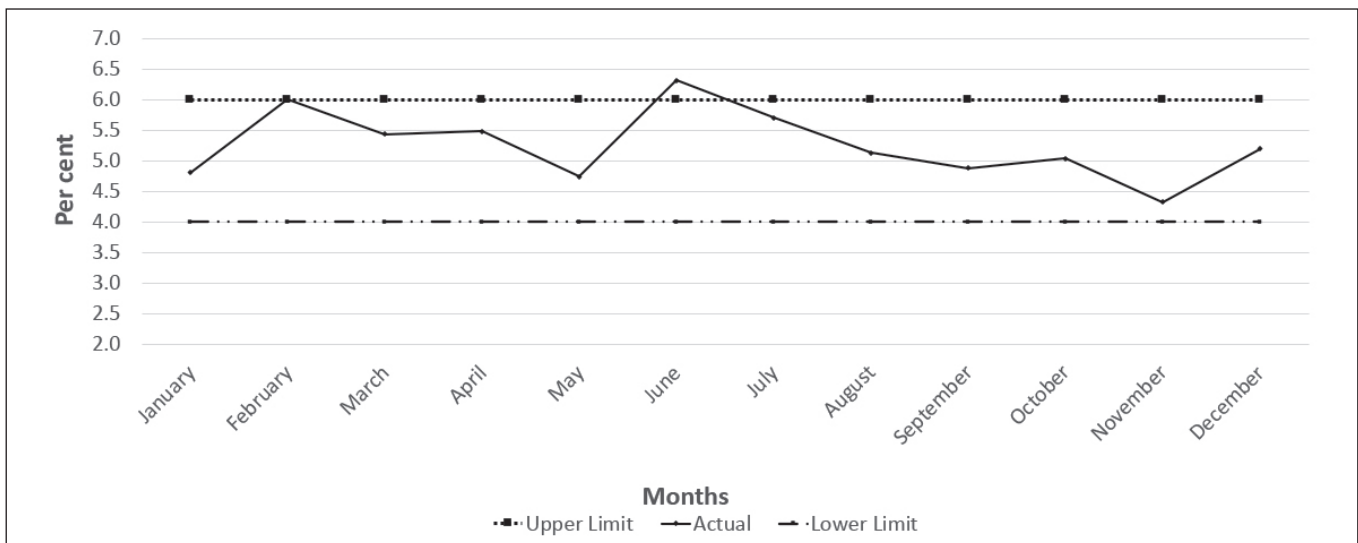


FIGURE 7B: 12 MONTHLY POINT-TO-POINT INFLATION, 2020

the exchange rate.

The BOJ employed several tools to effectively manage liquidity conditions for Jamaican currency. These included the 30-day Certificate of Deposits (CDs), the 14-day repo (both of which are offered through an auction system), the overnight deposit facility and the SLF. Foreign exchange market flows were managed using both the B-FXITT mechanism and the Foreign Exchange Swap arrangements.

In a pre-emptive approach to the impact of the COVID-19 pandemic the BOJ enacted eight measures to ensure that there were adequate levels of liquidity within the economy and the maintenance of financial stability. These measures spanned both local and foreign currency liquidity.

Foreign currency policies were as follows:

- continued direct sale of foreign currency to authorized dealers and cambios, as well as the halt of investment transactions that require the purchase of foreign exchange
- an increase 5.0 percentage points to 25.0 per cent in the limit on the foreign currency net opening position (FXNOP) of authorized dealers of regulatory capital⁵ by. This resulted in an increase in the amount of foreign currency authorized dealers can make available to their clients.⁶ This instrument came into effect on March 19, 2020 and ended on June 30, 2020.
- an expansion in the volume of the FX currency swap arrangements with authorized dealers which came into effect on January 22, 2020. Under this arrangement, the BOJ will sell US dollars to authorized dealers within a predetermined limit at the prevailing market rate, with an agreement to buy back the same total of US dollars at a specific time in the future at an agreed forward rate.

Local currency measures were:

- initiation of a bond buying programme to purchase Government securities from cash-strapped financial entities which may want to redeem these bonds before the maturity dates as well as redeem BOJ securities if deemed necessary. In further reviews of the financial market this programme was discontinued in April 6, 2020 after the Central Bank's assessment of liquidity conditions being adequate.
- removal of the limit on amounts available to DTIs under the SLF. For sums borrowed by DTIs over the limit, the excess amount would be obtained at the Excess Funds Rate. Effective March 18, 2020, DTIs can access funds at the prevailing SLF rate of 2.50 per cent, being limited only by collateral

- reintroduction of a longer-term lending facility, effective March 26, 2020. Under this arrangement DTIs will be able to borrow from the Central Bank over a longer period of up to six months. This allows these entities more flexibility in handling liquidity concerns over an extended period
- Central Bank acting as a go between among DTIs which have liquidity surpluses and those with liquidity needs. This removes the limits on the sums to be borrowed which would normally be imposed by lenders if these banks interacted directly. The Central Bank uses its balance sheet to facilitate the transaction.
- reactivation of the Emergency Liquidity Facility that was established in 2015. This is accessible to any financial institution upon application.

As a further response to liquidity constraints caused by COVID-19 the Central Bank sought to increase the level of credit to the private sector by reducing the cash reserve requirements of DTIs by 2.0 percentage points to 13.0 per cent and 5.0 per cent for both foreign and local currency, respectively. As a result, the overall liquid asset requirement of DTIs fell to 19.0 per cent for local currency and 27.0 per cent for foreign currency.

The heightened levels of liquidity and the utilisation of the monetary transmission mechanism to the market via the policy rate led to lower yields for the GOJ's Treasury Bills (T-Bills). At the end of December, the yield on the 3-months T-Bill was 0.77 per cent relative to 1.25 per cent, while for the 6-months the T-Bill yield was 0.86 per cent relative to 1.45 per cent in 2019 (see Table 7.1 and Figure 7A).

TABLE 7.1
INTEREST RATES ON BOJ CERTIFICATE OF DEPOSIT
AND GOJ INSTRUMENTS, 2016–2020

Year	BOJ Rates		T-Bill Rates	
	Policy Rate ^a	3-months	6-months	
2016	5.00	5.68	6.56	
2017	3.25	4.18	4.63	
2018	1.75	2.05	2.07	
2019	0.50	1.25	1.45	
2020	0.50	0.77	0.86	

a-Effective July 2017, the BOJ transitioned from the use of the 30-day rate to the Overnight Rate as its policy rate.

Source: Bank of Jamaica

5. FXNOP is defined for authorized dealers as under the Banking Services Act and represents the aggregate of the net spot position, the net forward position, guarantees and any other item representing profit or loss in foreign currencies.

6. FX Position Limits apply to cambios and is based on gross commercial purchases from non-Authorized dealers and non-cambios.

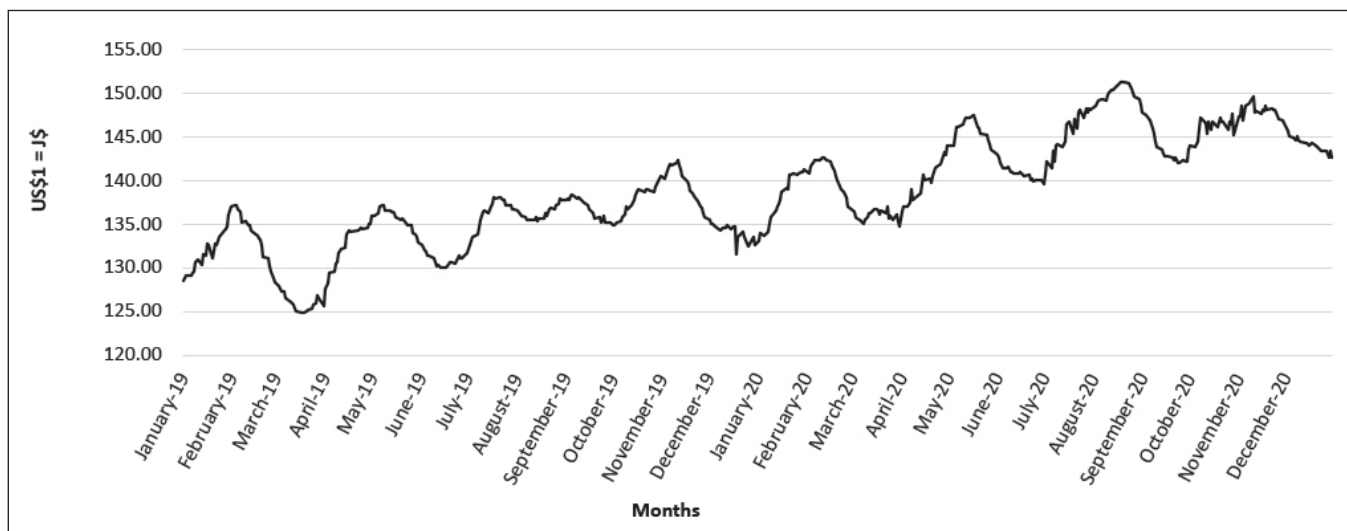


FIGURE 7C: NOMINAL EXCHANGE RATE MOVEMENT (USD/JMD) 2019-2020

Exchange Rate

The market exhibited a bi-directional movement which is a characteristic of a floating exchange rate system (Figure 7C). Periods of depreciation were linked to a reduction in supply caused by decreased foreign exchange inflows from exports and some sectors such as tourism—one of Jamaica’s top sources of foreign exchange—due to the onset of the COVID-19 pandemic and restrictions on international travel.

The response of the BOJ through B-FXITT and the Foreign Currency Swap arrangement contributed to the subsequent periods of appreciation of the Jamaican dollar. Other factors which buoyed the dollar included the approval of a US\$520.0 million disbursement to Jamaica under the Rapid Financing Instrument⁷ (RFI) of the IMF to address Balance of Payments challenges which could arise from the COVID-19 pandemic. This boosted confidence within the foreign exchange market that there would be an adequate supply of foreign exchange.⁸ Increased remittances in the latter part of the year also contributed to an increase in supply of foreign currency and an appreciation of the exchange rate.

The weighted average selling rate of the United States dollar at the end of 2020 was \$142.65 per US\$1.00, representing a nominal depreciation of 7.6 per cent and a real depreciation of 3.7 per cent. This was relative to a nominal depreciation of 3.8 per cent and real appreciation of 0.0 per cent in the average selling rate for 2019. The

depreciation in the exchange rate was partly due to:

- increased demand from businesses especially those engaged in manufacturing and distributive trade activities
- greater demand from the energy sector specifically Petrojam and Jamaica Public Service
- increased end user demand for foreign currency by firms replenishing their stock in preparation for the Christmas holiday period.

Monetary Base

At the end of December the monetary base had increased by 27.9 per cent to \$282.6 billion compared with 2019. The higher monetary base ensued from increases by \$41.9 billion in the Net International Reserves (NIR), and by \$19.7 billion in the Net Domestic Assets (NDA) (Table 7.2).

The NIR valued at US\$3 130.8 million was US\$31.8 million below the stock recorded at the end of 2019. This out-turn was weakened by net sales from public sector entities, GOJ debt repayments and foreign exchange sales to the market through the B-FXITT mechanism.

Gross International Reserves (GIR) was US\$4 085.8 million and represented an estimated 38.85 weeks of projected imports of goods and services. Comparatively, for the period ending December 2019, the GIR was US\$3 631.1 million, representing 22.94 weeks of projected imports of goods and services.

7. The Rapid Financing Instrument (RFI) provides rapid financial assistance which is available to all member countries facing an urgent balance of payments need. The RFI was created as part of a broader reform to make the IMF’s financial support more flexible to address the diverse needs of member countries. The RFI replaced the IMF’s previous emergency assistance policy and can be used in a wide range of circumstances.
8. Short-term moves in a floating exchange rate currency reflect speculation, rumors, disasters, and everyday supply and demand for the currency. Speculation based upon information can either lead to an appreciation or depreciation in the exchange rate.

TABLE 7.2
SUMMARY OF THE MONETARY AUTHORITY'S ACCOUNTS, DECEMBER 2018 – DECEMBER 2020
(\$ Million)

	Stock ^a			Flows		
	2018	2019 ^r	2020 ^r	2018	2019 ^r	2020 ^r
NIR (US\$M)	3 005.4	3 162.5	3 130.8	- 202.9	157.1	- 31.8
NIR	383 399.7	403 445.0	445 328.2	-25 881.4	20 045.3	41 883.2
NDA	-180 852.6	-182 491.4	-162 755.2	58 035.9	-1 638.8	19 736.2
Net Claims on Public Sector	137 082.6	92 866.8	222 068.3	11 792.9	-44 215.8	129 201.5
Net Credit to Banks	-63 233.2	-67 433.6	-69 050.6	401.8	-4 200.5	-1 617.0
Open Market Operations	-73 962.1	-45 884.5	-124 035.7	19 530.9	28 077.6	-78 151.2
Other	-180 740.0	-162 040.1	-191 737.1	26 310.2	18 699.9	-29 697.1
MONETARY BASE	202 547.1	220 953.6	282 573.0	32 154.5	18 406.5	61 619.4
Currency Issue	133 544.8	148 863.7	190 488.1	22 624.6	15 318.8	41 624.5
Cash Reserve	67 484.2	45 976.1	39 116.5	8 725.1	-21 508.2	-6 859.6
Current A/C	1 518.1	26 113.9	52 968.4	804.8	24 595.9	26 854.5

a - End of December

r - revised

Source: Bank of Jamaica

The increase in the NDA was as a result of a \$129.2 billion rise in Net Claims on the Public Sector reflecting a build-up in Central Government deposits held at the BOJ. Further growth was stymied by an increase in Open Market Operation by \$78.2 billion, as well as declines of \$1.6 billion and \$29.7 billion in the categories Net Credit to Banks and Other, respectively.

The Monetary Base grew by \$61.6 billion, the net result of increases in Currency Issue (\$41.6 billion), and the Current Account of commercial banks (\$26.9 billion) and a decline in the Cash Reserve by \$6.9 billion.

INFLATION

The Statistical Institute of Jamaica introduced a new Revised All Jamaica Consumer Price Index (CPI) in April 2020. This new revised CPI holds several differences compared with the previous year. The previous CPI 2007 was based on information gathered in the HES2004/5 and used December 2006 as the base price reference period (BOX 7.1 and 7.2). The items for which data is collected are segmented using the Classification of individual consumption by purpose (COICOP) methodology outlined by the United Nations. The CPI utilises the information

from the HES to determine the basket of goods which best reflect the consumption patterns of the majority of households in Jamaica and then assigns weights to the different items in this basket. Prices are then collected for these items on a regular (usually monthly) basis to inform the index. This new revised CPI utilises a more recent HES (2017) database which would give a more accurate representation of expenditure patterns and the types of goods and services within the economy. In addition it uses the COICOP 2018 classification as opposed to the previous COICOP⁹ (1999) classification structure. This led to changes in the number of divisions in the CPI as well as the a rearrangement of the items within these division. In addition, the new revised CPI 2020 uses a more recent and comprehensive base pricing period. Information for the entire year of 2019 was garnered to remove the bias of seasonality in the movement of prices as opposed to just the price for one month. Previously a single month was used as the reference period.

Consumer Price Index (CPI)

The April 2020 Consumer Price Index (CPI) bulletin introduced a new CPI series starting April 2020. At the end of

9. The Classification of individual consumption by purpose, abbreviated as COICOP, is a classification developed by the United Nations Statistics Division to classify and analyze individual consumption expenditures incurred by households, non-profit institutions serving households and general government according to their purpose. It includes categories such as clothing and footwear, housing, water, electricity, and gas and other fuels.

**BOX 7.1:
DIFFERENCES BETWEEN THE OLD CPI AND THE NEW REVISED CPI**

Changes	Old CPI (1999)	New CPI 2020
Classification Structure	12 Divisions – Using COICOP 1999, the CPI is divided into divisions and then further subdivided into groups and then classes	13 Divisions – The new CPI utilises the updated COICOP ⁹ (2018) which has 13 divisions. A new division “Insurance and Financial Services had been included. A number of items have been moved to different divisions and the weightings have been revised.
Expenditure profile (low-middle income households)	85.0 per cent of households	80.0 per cent of households
Number of commodities	480	322
Data Collection	Done once a month	Done twice a month for volatile products such as agricultural produce and petroleum products
Base period	Usually based on a single month	Incorporates a full calendar year (2019) to account for seasonality in prices.

**BOX 7.2:
DIFFERENCES IN WEIGHT FOR THE OLD AND NEW COICOP**

COICOP Broad Expenditure Divisions	Old Weights (COICOP 1999)	New Weights (COICOP 2018)
01 FOOD AND NON-ALCOHOLIC BEVERAGES	37.5	35.8
02 ALCOHOLIC BEVERAGES, TOBACCO AND NARCOTICS	1.4	1.5
03 CLOTHING AND FOOTWEAR	3.3	2.5
04 HOUSING, WATER, ELECTRICITY, GAS AND OTHER FUELS	12.8	17.8
05 FURNISHINGS, HOUSEHOLD EQUIPMENT AND ROUTINE HOUSEHOLD MAINTENANCE	4.9	3.8
06 HEALTH	3.3	2.6
07 TRANSPORT	12.8	11.2
08 INFORMATION AND COMMUNICATION	4.0	4.6
09 RECREATION, SPORT AND CULTURE	3.4	5.0
10 EDUCATION SERVICES	2.1	2.4
11 RESTAURANTS AND ACCOMMODATION SERVICES	6.2	6.7
12 INSURANCE AND FINANCIAL SERVICES	8.4	1.1
13 PERSONAL CARE, SOCIAL PROTECTION AND MISCELLANEOUS GOODS AND SERVICES		5.0
	100.0	100.0

2020, the All Jamaica ‘All Divisions’ CPI recorded 12-month point-to-point inflation of 5.2 per cent compared with 2019 (Figure 7D). Core Inflation—inflation excluding the movement in agriculture and energy prices—stood at 3.6 per cent.

Given the inception of the new CPI which has a different classification structure and number of divisions, analysis of price movements at the divisional level is conducted for the period April–December, the period for which data on all divisions under the new CPI is available. For this nine-month period, inflation was 5.1 per cent. Of the 13 divisions within the index, 9 recorded higher indices, three

declined and one remained relatively flat.

Inflationary impulses during April–December predominantly stemmed from:

- increases in the prices of agricultural produce caused by adverse weather conditions which affected food supply resulting from the combination of drought conditions in the first half of the year and heavy rains associated with storms in the latter part of the year
- increased electricity costs associated with increases in the rates for electricity bills.

Further inflationary pressure was alleviated by lower housing rental costs and billing rates for water and sewage.

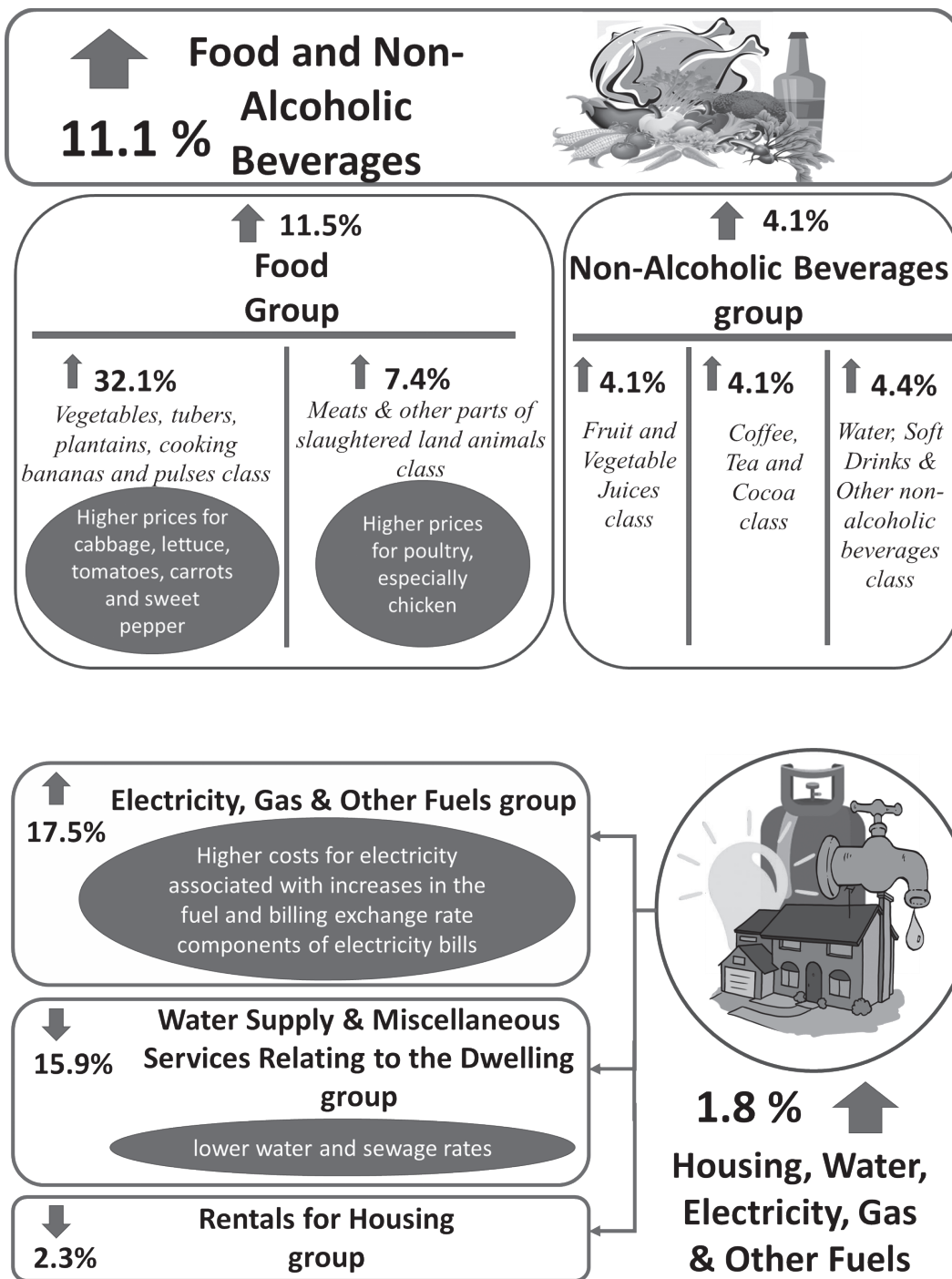
The **Food and Non-Alcoholic Beverages** division increased in its index with the primary catalyst being higher food prices caused by weather shocks (Table 7.3). In the April–June quarter the Meteorological Office of Jamaica reported that most sections of the island experienced meteorological drought conditions. This combined with the occurrence of heavy rains, affected the supply of agricultural produce and led to higher prices.

The index for **Alcoholic Beverages Tobacco & Narcotics** increased by 2.1 per cent mainly reflecting increases in the prices for alcoholic beverages especially beers (see Table 7.3).

There was an increase of 3.6 per cent in the index for the **Clothing & Footwear** division. This was attributed to upward index shifts for the groups Clothing (4.3 per cent) and Footwear (2.4 per cent).

The **Furnishings, Household Equipment & Routine Household Maintenance** division recorded an increase of 3.7 per cent. The main catalysts of this increase came from movements within the Goods & Services for Routine Household Maintenance (3.5 per cent) and the Furniture, Furnishings & Loose Carpets (5.6 per cent) groups.

The index for **Housing, Water, Electricity, Gas & Other Fuels** division recorded an upturn, with the group Electricity, Gas & Other Fuels providing the largest contribution to the

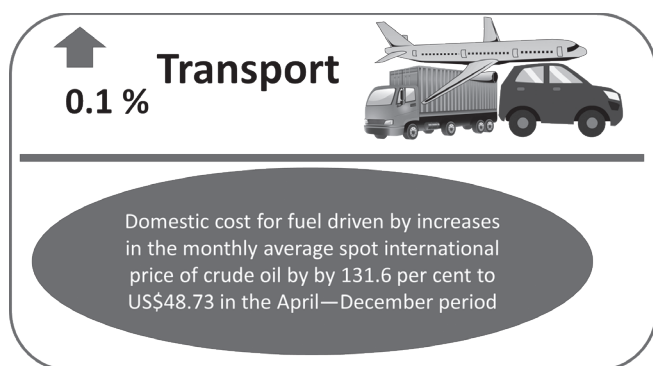


division’s upward movement. Further increases in the division’s index were tempered by declines in the groups Water Supply & Miscellaneous Services Relating to the Dwelling and Rentals for Housing.

Health expenses rose by 3.0 per cent, buttressed by increases in various over-the-counter drugs, prescription drugs and medical products, which resulted in a 3.2 per cent rise in the group Medicines and Health Products. Other sources of inflation were increases in the group Outpatient Care Services (3.2 per cent) and Other Health Services (0.6 per cent).

TABLE 7.3
INFLATION, APRIL–DECEMBER, 2020

ALL DIVISIONS	5.1
01 - FOOD AND NON-ALCOHOLIC BEVERAGES	11.1
FOOD	11.5
Cereals and cereal products (ND)	4.4
Meat and other parts of slaughtered land animals (ND)	7.4
Fish and Seafood (ND)	4.8
Milk, other dairy products and eggs (ND)	3.9
Oils and Fats (ND)	5.0
Fruits and nuts (ND)	8.9
Vegetables, tubers, plantains, cooking bananas and pulses (ND)	32.1
Tubers, Plantains and cooking Banana (Starchy Foods)	9.0
Vegetables	40.3
Sugar, confectionery and desserts (ND)	5.9
Ready-made food and other food products n.e.c. (ND)	9.5
NON-ALCOHOLIC BEVERAGES	4.1
Fruit and vegetable juices (ND)	4.1
Coffee, Tea, Cocoa	4.1
Water, Soft drinks and Other non-alcoholic beverages	4.4
ALCOHOLIC BEVERAGES, TOBACCO AND NARCOTICS	2.1
CLOTHING AND FOOTWEAR	3.6
Clothing	4.3
Footwear	2.4
HOUSING, WATER, ELECTRICITY, GAS AND OTHER FUELS	1.8
Rentals for Housing	-2.3
Maintenance, Repair and Security of Dwelling	2.0
Water Supply & Miscellaneous Services Relating to the Dwelling	-15.9
Electricity, Gas & Other Fuels	17.5
FURNISHINGS, HOUSEHOLD EQUIPMENT AND ROUTINE HOUSEHOLD MAINTENANCE	3.7
Furniture, Furnishings and Loose Carpets	5.6
Household Textiles	4.5
Household Appliances	3.0
Tools & Equipment for House & Garden	2.6
Goods & Services for Routine Household Maintenance	3.5
HEALTH	3.0
Medicines and Health Products	3.2
Outpatient Services	3.2
Other Health Services	0.6
TRANSPORT	0.1
INFORMATION AND COMMUNICATION	-1.8
RECREATION, SPORT AND CULTURE	3.8
EDUCATION	-3.2
RESTAURANTS AND ACCOMMODATION SERVICES	3.8
INSURANCE AND FINANCIAL SERVICES	-0.0
PERSONAL CARE, SOCIAL PROTECTION AND MISCELLANEOUS GOODS AND SERVICES	4.1



The index for the **Transport** division driven by increases in the price of crude oil on the international market. This was mainly attributed to the combination of an oil price war between Saudi Arabia and Russia¹⁰ and a sharp decline in the demand for crude oil due to restrictions on international travel to stem the spread of COVID-19. These led to declines by 60.6 per cent to US\$21.04 in the price of oil within the February–April period. Subsequently the price of oil increased as the global economy slowly began to reopen and demand for oil began to increase.

The **Information and Communication** division's index fell by 1.8 per cent mainly predicated on declines in the index Information and Communication Services.

The index for the **Recreation, Sport & Culture** division rose by 3.8 per cent primarily driven by respective increases in the groups Newspapers, Books & Stationery, due to increased prices for the items books, stationery and drawing materials, and Garden Products and Pets, stemming from higher prices for some pet food.

The division **Education** registered a decline of 3.2 per cent in its index, largely due to declines in school fees for private institutions in response to the impact of the COVID-19 pandemic on the spending capacity of some households and the restrictions on movement to stem the spread of the virus.

The index for **Restaurants & Accommodation Services** rose by 3.8 per cent, associated with increased costs for meals consumed away from the home and for accommodation services. The latter was partly attributed to a nominal depreciation in the exchange rate by 5.9 per cent.

There was a 4.1 per cent increase in the index for the **Personal Care, Social Protection And Miscellaneous Goods & Services** division. This out-turn was supported by higher costs for personal care products which included

toothpaste, bath soap, toilet paper and shampoo as well as some personal services such as male haircuts.

The division's index for **Insurance and Financial Services** recorded no change.

Producer Price Index (PPI)¹¹

Price changes from the perspective of the producer were measured using the PPI which is a complementary tool for economic analysis. The PPI for the Mining & Quarrying industry decreased by 3.3 per cent during 2020. This resulted from a down-turn of 3.5 per cent in the index for the group Bauxite Mining & Alumina Processing which outweighed a 1.3 per cent increase in the group Other Mining & Quarrying.

An increase of 1.1 per cent was recorded for the PPI of the Manufacturing industry. The increase in this index was attributed to the depreciation of the Jamaican dollar relative to the US dollar, higher labour costs, and increased raw material costs owing to the impact of adverse weather conditions on the food processing component of the Manufacturing industry. The groups with the most notable increases were the heaviest weighted Food, Beverages & Tobacco (4.0 per cent), as well as:

- Wood, Wood Products and Furniture (12.9 per cent)
- Other Manufacturing n.e.c (7.0 per cent)
- Textile, Wearing Apparel and Leather Products (3.9 per cent).

OUTLOOK

The BOJ will continue to steer monetary policy with the objective of achieving the medium term inflation target of 4.0 per cent to 6.0 per cent during 2021 particularly within the context of the continued impact of the COVID-19 pandemic and the preventative safety measures. The challenges include lower domestic and global demand, reduced international trade in goods and services, increased unemployment and uncertainty.

The risks to inflation are trending towards the downside due to several measures. Specifically:

- A further weakening in domestic demand conditions primarily caused by the re-introduction of lockdown measures due to an upsurge in positive COVID-19 cases.
- A downturn in prices for agricultural items due to a rebound in productivity following the adverse weather conditions in the last quarter of 2020. The Meteorological Office of Jamaica forecasts near-normal weather for the January-March quarter.

10. The price war was due to a disagreement which ended in a breakdown in talks over proposed cuts in production between Russia and the Organization of the Petroleum Exporting Countries (OPEC) in the face of the COVID-19 pandemic. Subsequently Saudi Arabia initiated a price war with Russia on March 8, 2020.

11. The PPI measures the average change in the price received by local suppliers of goods and services over a given time period. It captures basic price of output, which includes subsidies received but deducts taxes payable by the supplier as a consequence of its production or sale. STATIN currently computes the PPI for the Mining & Quarrying and Manufacturing industries only.

Inflationary impulses may emanate from international sources such as:

- An upswing in international crude oil prices. The introduction of vaccines in some of the advanced countries in 2020 has led to increased confidence in the oil market. This is expected to begin the process of improving business and consumer confidence and ultimately economic activity, which in turn may lead to a slight rebound in international oil prices. The average spot peak price of crude oil, for January 2021 increased by 10.0 per cent to US\$53.60 per barrel relative to December 2020.
- Higher prices for international grains. This is predicated on disruptions in supply from Argentina as a result of strikes by port and grain unions during December 2020. At least 1.4 million mt¹² of wheat was delayed in shipment during the 20-day strike which ended December 29, 2020. Prices are also expected to be pushed higher due to market expectations of lower winter wheat production in the United States associated with dry or very cold weather in the winter period.¹³ Grain prices also may see further increases due to increased demand from China for wheat for their pig industry which is recovering from the 2018 African Swine Flu epidemic.

Domestically inflation may stem from an increase in electricity bills, owing to an upward adjustment in tariff rates granted by the Office of Utilities Regulation's (OUR) to the Jamaica Public Service Company Limited (JPS) after their 2019-2024 tariff application. These rates were approved on December 28, 2020 and will come into effect in February 2021.

The Bank of Jamaica (Amendment) Act, 2020 is expected to become effective on April 16, 2021. The objectives of the BOJ are the maintenance of price and financial stability with the primary objective being the maintenance of price stability.

Under the Act, the BOJ will be further enabled to create conditions for planning over the long term, greater financial inclusion and deepening of financial markets with the institutionalizing of its autonomy through the Bank of Jamaica (Amendment) Act, 2020 in April 2021. This will ensure credibility within the market in terms of monetary policy and allow for the more effective transmission of policy actions by the BOJ. ■

12. Metric tonnes.

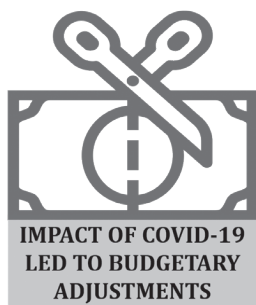
13. The United States of America, Russia and Ukraine account for approximately 42.0 per cent of global wheat production. During October 2020 in the United States much of the wheat producing area experienced very dry weather and during December 2020 the 2021 wheat crop was affected by winter storms.

FISCAL ACCOUNTS¹

INTRODUCTION

The budget for fiscal year (FY) 2020/21 for the Government of Jamaica (GOJ) was drafted against the background of the GOJ’s main objectives and Economic Reform Programme, which are aligned to Vision 2030 Jamaica – National Development Plan. For the FY2020/21 budget, the GOJ’s commitment to fiscal discipline remained with emphasis on stronger and more broad-based growth, as well as quality of spending while protecting revenue. Within this context, the budget prioritized allocations to National Security, Infrastructure, Health and Education. Accordingly, the Fiscal Policy Paper (FPP) for FY2020/21 outlined quantitative targets including:

- real economic growth of 1.2 per cent
- inflation rate of 4.4 per cent
- fiscal surplus of 0.7 per cent of GDP
- primary surplus of 6.5 per cent of GDP
- debt stock of 87.2 per cent of GDP.



Subsequent to the approval of the FY2020/21 budget in March 2020, two supplementary budgets were tabled due to the impact of the coronavirus disease 2019 (COVID-19) pandemic on both the global and domestic economy. The First Supplementary Estimates for FY2020/21 were tabled in May 2020 and included:

- a \$31.0 billion stimulus consisting of \$15.0 billion in tax cuts and spending stimulus of \$16.0 billion aimed at mitigating the negative effects of COVID-19
- an additional \$3.0 billion in spending for public body support

- an increase of \$6.0 billion in health expenditure
- the relaxation of the FY2020/21 primary fiscal surplus target to 3.5 per cent of GDP (down from 5.4 per cent²) to accommodate the emergency expenditure
- a projected reduction in revenue of \$81.0 billion.

Given the need for the above adjustments, the Financial Administration and Audit (Amendment) Act, 2020 was passed to suspend the fiscal rule of meeting the debt-to-GDP ratio target of 60.0 per cent by FY2025/26. The target year was suspended by two years to FY2027/28.

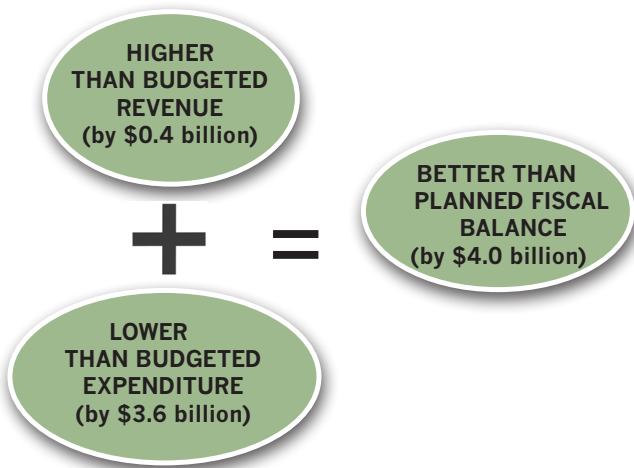
The Second Supplementary Budget was tabled in September 2020. All references to the budget for FY2020/21 and the actual outcome versus budget comparison are with the newly approved Supplementary Budget. For this tabling, adjustments included increases in both Revenue & Grants and Expenditure (above-the-line) which translated to a worsening of the budgeted fiscal deficit by approximately \$10.0 billion and a lower primary surplus by \$11.4 billion. The increased allocation for expenditure accounted for expected additional spend, including staff costs and the purchase of drugs for the Ministry of Health & Wellness and assistance to educational institutions to aid in their response to COVID-19. These revised budgeted out-turns reflected the continued negative impact of the COVID-19 pandemic on the economy and the fiscal accounts.

A fiscal deficit of \$72.9 billion was budgeted for Central Government operations for FY2020/21 compared with a fiscal surplus of \$19.4 billion in FY2019/20 (Table 8.1a). Revenue & Grants inflows were budgeted at \$585.1 billion, representing a \$64.7 billion decrease relative to actual inflows in FY2019/20. Expenditure (above-the-line)³ was programmed at \$658.0 billion, an increase of \$27.7 billion compared with actual expenditure in FY2019/20. This planned increase in expenditure was due to a higher allocation for Recurrent Expenditure (by \$44.5 billion to

1. The ESSJ document is based on the calendar year; therefore, the Fiscal Accounts chapter reviews the April–December period for discussions on actual outcomes and on a fiscal year basis for discussions on the budget.
2. The target stated in the FPP, which was tabled in February 2020 was 6.5 per cent, however, on March 10, 2020 during the Finance Minister’s speech and opening budget presentation he indicated there would be a reduction of 1.1 per cent to 5.4 per cent in the primary surplus as a share of GDP for FY2020/21 to increase the fiscal space by approximately \$25.0 billion—in part due to a 1.5 percentage point reduction in the standard GCT rate translating to a loss of \$14.0 billion.
3. This represents expenditure used to calculate the fiscal balance and excludes Amortization payments and Other Outflows.

\$604.5 billion), as Capital Expenditure was projected to decline by \$16.9 billion to \$53.5 billion.

A total of \$559.0 billion was projected for non-debt expenditure (total expenditure less debt servicing) for FY2020/21 and was \$22.2 billion higher than actual non-debt spend in FY2019/20. For debt servicing obligations (Amortization plus Interest), there was an allotment of \$294.8 billion compared with actual debt servicing costs of \$300.5 billion in the previous fiscal year (Table 8.1a). This reduced allocation was due to lower provisions for external debt within both Amortization and Interest. Programmed debt-servicing expense accounted for 34.5 per cent of total expenditure relative to the actual share of 35.9 per cent in FY2019/20.



For the period April–December 2020, a fiscal deficit of \$70.3 billion was generated for Central Government operations compared with a budgeted fiscal deficit of \$74.2 billion (Figure 8a). This out-turn reflected lower than

programmed Expenditure (above-the-line) {by \$3.6 billion} and higher than budgeted Revenue & Grants (by \$0.4 billion) {Table 8.1b}. The higher than budgeted Revenue & Grants was due to higher than budgeted inflows from Non-Tax Revenue and Grants, which outweighed lower than budgeted Tax Revenue.

FISCAL POLICY AND PROGRAMMES

FISCAL POLICY

Creating an enabling environment which promotes investment and inclusive growth remained a priority of the GOJ. With the support of the International Monetary Fund, the GOJ implemented a number of reforms geared towards entrenched macroeconomic stability, strengthened budget credibility and improved fiscal outcomes. Against this background and despite the negative impact of COVID-19, there was continued implementation of fiscal, macro-financial and structural reforms aimed at reducing debt, while generating economic growth and creating jobs.

Reform Agenda 2020

A number of acts were amended to improve efficiency and strengthen overall fiscal sustainability; among these were:

The National Housing Trust (Amendment) (Special Provisions) Act, 2020 – the amendment

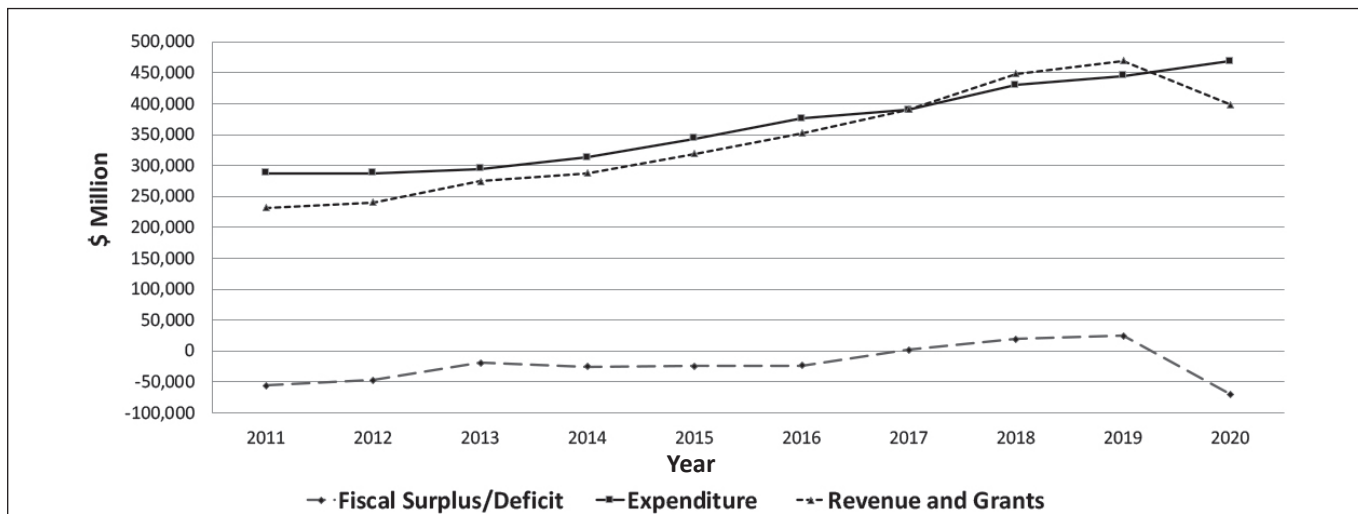


FIGURE 8A: EXPENDITURE (ABOVE-THE-LINE), REVENUE & GRANTS AND FISCAL SURPLUS/DEFICIT FOR APRIL–DECEMBER 2011–2020

allowed for the continued provision from the NHT to Central Government of a maximum annual total of \$11.4 billion for fiscal consolidation in respect of each financial year ending March 31, 2022 through to 2026.

The General Consumption Tax (Amendment) Act, 2020 – the amendment, which increased the annual GCT threshold from \$3.0 million to \$10.0 million was geared towards improving doing business for Medium, Small and Micro Enterprises (MSMEs).

The Appropriation Act, 2020 – gave the government legal authority for the collection of revenues, the raising of loans and the expenditure of funds for the purposes approved by parliament for FY2020/21.

Revenue Administration (Amendment) Act, 2020 – passed to give Jamaicans the ability to conduct financial transactions through more secure channels by incorporating the common reporting standards (CRS) into domestic law to improve transparency and ensure Jamaica is a safe place to do business.

The Income Tax (Amendment) Act, 2020 – this amendment instituted an annual income tax credit of \$375 000 for both regulated and unregulated MSMEs that earn up to \$500.0 million each year and file taxes. It was geared towards providing support to MSMEs as they deal with the continued impact of COVID-19.

Public Sector Transformation

In its commitment to improving the efficiency, cost effectiveness and quality of the public sector, the GOJ embarked on completing a compensation review, a process that commenced in 2017. The review was completed in 2020 and a proposal submitted with key recommendations, including:

- a single, common factor-based job evaluation system that will provide a consistent basis for comparison of jobs across the public service
- moving to a common pay grading structure where all jobs throughout the core civil service, agencies, education and protective services will be aligned to a single set of bands
- proposals for the introduction of pay for performance in order to recognize and reward high performance and excellent performers
- rationalization and consolidation of allowances into basic pay, where possible, resulting in a simpler and more transparent approach to total compensation.

Revenue Strategy

The primary goal of the GOJ's revenue strategy is to continue to enhance the tax system making it simpler, more equitable and more efficient. An improved tax system will ensure that government expenditure is amply funded

and facilitates a more competitive business environment supportive of economic growth and development. As a result, the GOJ continued to implement strategic policy and administrative actions aimed at achieving its overall goal through Tax Administration Jamaica (TAJ) and Jamaica Customs Agency (JCA).



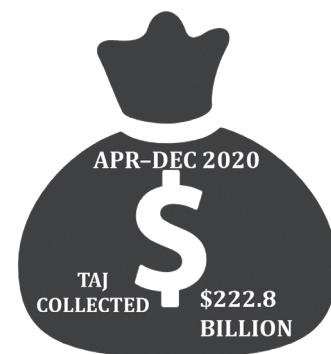
Tax Administration Jamaica (TAJ)

TAJ strengthened the strategies employed in FY2019/20 consistent with its five main strategic objectives: to improve voluntary compliance; engender a customer centric organization; promote institutional strengthening of the organization; build human capital synergies and culture; and enhance corporate governance.

In pursuing its strategic objectives and impacted by COVID-19, the TAJ hastened the implementation of online measures and prioritized resources that would further enhance channels for conducting business. For the review period, TAJ:

- completed critical activities for the enhancement of TAJ's direct banking procedure
- launched its mobile app for property tax, motor vehicle fitness certificate and payment of traffic tickets
- launched an online payment option for the renewal of driver's licence and a drop box service for submitting applications
- launched an online payment option for retail and corporate bank customers.

For the period April–December 2020, a total of \$222.8 billion was collected by the entity, \$4.2 billion below target. TAJ continued to design compliance programmes around taxpayer segments based on declared turnover. These programmes were designed to address gaps in compliance with respect to registration, filing, payment and accuracy of reporting, in line with international best practice. Due to the impact of COVID-19, the usual methods of contacting non-compliant taxpayers were suspended and communication was executed via the telephone or through email. Regardless of these challenges, the following results and



actions were achieved during the review period:

- Registration Compliance – 9 135 new taxpayers were registered compared with a target of 9 000. These new registrants were identified via third-party information, data mining activities and street surveys. In addition, 70 751 taxpayer records were updated and 1 753 taxpayers were deregistered.
- Filing and Payment Compliance – on-time filing rate at the end of December 2020 was 56.2 per cent compared with 51.7 per cent at the end of December 2019, primarily due to the deregistration of a number of taxpayers within the small and micro segment for General Consumption Tax (GCT) filing. On-time payment rates at the end of December 2020 was 95.5 per cent, down 1.6 percentage points relative to the corresponding period of 2019. This reduced out-turn is against the background of the implementation of a policy measure to suspend compliance actions for businesses to mitigate the impact of the global pandemic.
- Arrears Management – the stock of arrears at \$159.9 billion was an increase of \$16.7 billion during April–December 2020. This increase was associated with and the suspension of compliance actions due to the continued impact of COVID-19 and the issuance of moratoriums to some collection cases with monthly payment agreements in place.
- Accuracy of Reporting (Audit) – given the number of taxpayers that exhibited particular reporting risks and the revenue leakages arising from these risks, TAJ’s audit programme focused on extending the review of income tax returns; Pay As You Earn (PAYE) threshold abuse; taxpayers that submit returns with declared “Tax Losses” for three consecutive years and “nil” income tax returns. As at end-December 2020, 7.0 per cent of large taxpayers were audited compared with a target of 10.0 per cent, and 4.7 per cent of medium taxpayers were audited compared with a target of 6.0 per cent.

Jamaica Customs Agency (JCA)

In support of the overarching revenue strategy of the GOJ, the JCA’s medium-term strategic objectives included modernizing customs administration for sustainable contribution to economic development by 2024; improving trade facilitation and revenue collection, as well as improving border control operations. Associated with these objectives, the Bill introducing The Customs Act, 2020 was tabled in December and is before the Joint Select Committee of Parliament for review.

For the period April–December 2020, the achievements aligned with their mandate to collect revenue, facilitate trade and travel, and protect the country’s borders,

included:

- net revenue collection of \$135.6 billion, 4.0 per cent above the COVID-19 adjusted target and 24.0 per cent lower than in the corresponding period of 2019
- improvements in trade facilitation amidst the challenges posed by the COVID-19 pandemic such as the:
 - implementation of full automation where semi-automated processing was previously used, for example, the expansion of the Express Clearance Process, which removed the involvement of the Customs Officer from the preparation of a simplified declaration
 - introduction of online application for refunds processing
 - roll-out of e-services to reduce or eliminate walk-in clients for some areas of the JCA, including Customs House, the Returning Residents Unit and the Valuation Verification Unit where customers can now schedule appointments and conduct interviews online
 - mandatory use of the Jamaica Single Window for Trade (JSWIFT) for the Export Regime, this includes online applications for a license, payment and approval by the Trade Board Limited
 - an increase of 42.0 per cent in seizures compared with the corresponding period of 2019, with a cash value of US\$0.6 million.



Fiscal Council

Approval of The Independent Fiscal Commission Act, 2020 is expected in the last quarter of FY2020/21. The Independent Fiscal Commission will deepen transparency of fiscal policy, parameters, risks and outcomes.

Debt Management Strategy

The Medium Term Debt Management Strategy (MTDS) FY2020/21 to FY2023/24 governed by the Public Debt Management Act, 2012 continued to align with the GOJ’s policy objectives while ensuring that the GOJ’s financing needs are satisfied at prudent levels of risk. For FY2020/21, public debt management prioritized the reduction of the portfolio’s exposure to foreign currency, interest rate and refinancing risks. Consequently, the financing programme

mainly focused on domestic fixed-rate issuances across the yield curve as reflected by the Annual Borrowing Plan (ABP) for FY2020/21, which was disaggregated as follows:

- 60.5 per cent in domestic bonds
- 15.6 per cent in Treasury bills
- 14.0 per cent in investment loans
- 9.9 per cent in budget support loans.

Given the selected strategy of focusing on the domestic market, the GOJ continued work to develop an efficient domestic debt market. Reforms included the broadening of the primary dealers' obligations with particular focus



on their role as market-makers, with a view to increasing secondary market activity. In collaboration with the Jamaica Stock Exchange (JSE) and the Bank of Jamaica, an advancement was made in the development of a

fixed-income trading platform (FITP) for GOJ securities. Consistent with international standards and best practices, the FITP will facilitate listing of GOJ bonds on the JSE and will integrate the JSE's platform with the JamClear-CSD infrastructure. The planned listing of GOJ securities on the JSE is expected to improve operational efficiency through greater transparency and a higher level of security; promote deeper and liquid markets; facilitate real-time price discovery; improve market information and fair trading; and consequently, support the development of the domestic debt market.

SELF-FINANCING PUBLIC BODIES

The operations of the Self-Financing Public Bodies⁴ (SFPBs) were impacted by COVID-19 resulting in reduced revenue inflows compared with previous years. Collectively, the group of 54 SFPBs are projected to generate

**SELF-FINANCING
PUBLIC BODIES
PROJECTED TO GENERATE
AN OVERALL DEFICIT OF
\$13.5 BILLION FOR
FY2020/21**

an overall deficit of \$13.5 billion for FY2020/21, compared with an initial budgeted overall deficit of \$41.7 billion. The projected improvement in the overall deficit is primarily predicated on the performance of the National Housing Trust (NHT), which is expected to generate capital revenue totalling \$26.2 billion. The anticipated performance of the NHT will mainly arise from the disposal of a portion of the entity's joint finance mortgage portfolio valued at \$38.6 billion. Other main contributors to the budgeted out-turn include expected revenue of \$7.2 billion, \$6.2 billion above budget due to higher contributions for the National Insurance Fund; higher than budgeted overall surplus of \$1.3 billion (\$3.0 billion higher than budgeted) for the National Water Commission, emanating from lower than budgeted capital expenditure (by \$2.1 billion) and adjustments for net foreign exchange losses (by \$2.1 billion); and Factories Corporation of Jamaica with an estimated overall deficit of \$0.4 billion (\$1.8 billion lower than budgeted), resulting from delays on payments to suppliers and reduced capital investment mainly in relation to lagging activities on the Garmex and Morant Bay Projects.

Excluding SCT from Petrojam, transfers to the GOJ by SFPBs—including financial distributions and corporate taxes—are estimated at \$25.0 billion compared with a budgeted \$28.0 billion. A total of \$28.6 billion is expected from Petrojam in Special Consumption Tax, \$2.8 billion higher than initially budgeted consequent on higher sales volume and prices.

FISCAL PROGRAMMES

FUNCTIONAL CLASSIFICATION OF EXPENDITURE (FIRST SUPPLEMENTARY ESTIMATES⁵)

The GOJ continued to prioritize the areas of Education, Health and National Security for FY2020/21. Combined, the three areas accounted for 34.5 per cent of the total budget (a 0.8 percentage point increase) and 52.9 per cent of total non-debt expenditure (a decrease of 0.6 percentage point).

Education received an allocation of \$110.2 billion, an increase of \$0.2 billion and accounted for 13.0 per cent of the total budget compared with 12.8 per cent in the revised estimates of FY2019/20 (Figure 8B). The budgeted allocation for Health Services of \$83.8 billion was \$10.0 billion (13.6 per cent) higher compared with the FY2019/20 revised estimates and was 9.8 per cent of the total budget (an increase of 1.3 percentage points). This increased

4. These are public bodies for which more than 50.0 per cent of their revenue does not come from the Consolidated Fund, but is earned through sales of products and/or services, fees and other charges.

5. At the time of writing, the Second Supplementary Estimates by functional classification was not available.

TABLE 8.1a
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, FY2016/17 TO FY2020/21
(\$ MILLION)

	ACTUAL				BUDGET FY2020/21
	FY2016/17	FY2017/18	FY2018/19	FY2019/20	
i Revenue & Grants	499 879.9	560 773.6	628 985.2	649 759.2	585 100.0
Tax Revenue	458 323.4	496 894.6	542 919.4	579 397.0	515 580.1
Non-Tax Revenue	33 754.1	53 249.9	72 850.5	64 505.2	65 069.0
Bauxite Levy	1 940.9	127.5	136.5	0.0	146.1
Capital Revenue	568.6	4 887.1	2 531.7	1 200.2	310.6
Grants	5 292.8	5 614.4	10 547.0	4 656.8	3 994.2
ii Expenditure	503 356.0	552 050.1	604 597.5	630 354.4	658 014.5
Recurrent Expenditure	461 400.8	505 244.0	538 393.2	559 961.5	604 500.1
Programmes	142 976.4	176 779.5	209 079.7	216 856.6	242 978.6
Compensation of Employees	179 068.1	193 283.5	200 125.3	211 617.6	225 268.5
Wages & Salaries	166 484.7	178 366.3	183 505.5	195 936.2	208 350.0
Employers Contribution	12 583.4	14 917.2	16 619.8	15 681.4	16 918.5
Interest	139 356.2	135 181.0	129 188.1	131 487.3	136 253.0
Domestic	63 544.0	63 783.5	51 026.0	47 596.1	53 765.7
External	75 812.2	71 397.5	78 162.1	83 891.2	82 487.3
Capital Expenditure	41 955.3	46 806.1	66 204.3	70 392.9	53 514.3
Capital Programmes	41 955.3	46 806.1	66 204.3	70 392.9	53 514.3
iii					
iv Fiscal Balance (Surplus + / Deficit -) (i - ii) (Excludes Amortization Payments)	-3 476.1	8 723.4	24 387.7	19 404.8	-72 914.5
v Primary Surplus/Deficit (i - ii + iii)	135 880.1	143 904.5	153 575.8	150 892.1	63 338.5
vi Loan Receipts	89 826.8	207 133.0	114 180.1	126 060.1	188 624.4
Domestic	55 544.1	72 894.2	76 553.2	74 978.7	111 224.4
External	34 282.8	134 238.8	37 626.9	51 081.4	77 400.0
vii Divestment	14 604.7	0.0	0.0	0.0	0.0
viii Other Inflows (incl PCDF)	0.0	11 400.1	27 894.9	104 174.9	22 805.8
ix Other Outflows (incl BOJ Recap)	0.0	14 260.6	35 039.7	37 933.2	37 260.8
x Amortisation	75 389.7	232 289.9	132 990.1	169 046.6	158 555.6
Domestic	29 709.8	168 627.6	80 008.1	70 480.6	111 178.0
External	45 679.9	63 662.3	52 982.0	98 565.9	47 377.6
xi Overall Balance (Surplus +/Deficit -) - includes loan receipts and amortisation payments (iv + vi + vii + viii - ix - x)	25 565.7	-19 294.1	-1 567.1	42 660.0	-57 300.7
Memo Items					
Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	37 910.5	50 642.4	88 060.3	88 597.5	-19 710.8
Debt Servicing (iii + x)	214 745.9	367 470.9	262 178.2	300 533.9	294 808.6
Domestic	93 253.8	232 411.1	131 034.2	118 076.8	164 943.7
External	121 492.1	135 059.9	131 144.1	182 457.1	129 864.9

Source: Ministry of Finance and the Public Service

TABLE 8.1b
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, APRIL–DECEMBER 2016–2020
(\$ MILLION)

	Actual					Budget		% Change Actual/ Budget	% Change Actual 2020/ Actual 2019
	Apr–Dec 2016	Apr–Dec 2017	Apr–Dec 2018	Apr–Dec 2019	Apr–Dec 2020 ^p	Apr–Dec 2020			
i Revenue & Grants	352 039.9	390 947.6	448 772.7	469 156.3	398 261.6	397 883.4	0.1	-15.1	
Tax Revenue	322 067.9	353 063.2	388 666.1	414 749.6	346 492.4	347 237.0	-0.2	-16.5	
Non-Tax Revenue	22 854.2	32 202.8	50 639.0	49 680.0	47 772.8	47 178.1	1.3	-3.8	
Bauxite Levy	1 830.9	127.5	0.0	0.0	0.0	0.0	n/ap	n/ap	
Capital Revenue	416.0	2 187.9	2 511.2	826.3	22.1	22.1	0.0	-97.3	
Grants	4 870.9	3 366.3	6 956.4	3 893.8	3 974.2	3 446.1	15.3	2.1	
ii Expenditure	375 529.3	389 625.7	429 580.8	445 024.1	468 514.9	472 122.9	-0.8	5.3	
Recurrent Expenditure	345 652.3	358 653.7	384 174.9	404 810.4	432 084.7	433 588.1	-0.3	6.7	
Programmes	113 107.3	123 161.4	147 903.1	157 715.9	177 490.3	180 058.5	-1.4	12.5	
Compensation of Employees	132 267.6	140 272.3	147 779.3	158 516.6	166 808.0	167 211.4	-0.2	5.2	
Wages & Salaries	122 849.3	129 509.2	136 446.2	147 223.2	155 740.8	155 804.2	-0.0	5.8	
Employers Contribution	9 418.2	10 763.1	11 333.1	11 293.3	11 067.2	11 407.2	-3.0	-2.0	
Interest	100 277.5	95 220.1	88 492.6	88 578.0	87 786.4	86 318.2	1.7	-0.9	
Domestic	44 481.0	45 483.8	34 492.0	33 505.0	35 451.0	32 542.7	8.9	5.8	
External	55 796.5	49 736.3	54 000.6	55 073.0	52 335.5	53 775.5	-2.7	-5.0	
Capital Expenditure	29 877.0	30 971.9	45 405.9	40 213.6	36 430.2	38 534.8	-5.5	-9.4	
Capital Programmes	29 877.0	30 971.9	45 405.9	40 213.6	36 430.2	38 534.8	-5.5	-9.4	
Fiscal Balance (Surplus +/Deficit -)									
iv (i - ii) (Excludes Amortization Payments and Other Flows)	-23 489.4	1 322.0	19 191.9	24 132.2	-70 253.4	-74 239.5	-5.4	-391.1	
v Primary Surplus/Deficit (i - ii + iii)	76 788.1	96 542.1	107 684.4	112 710.2	17 533.0	12 078.7	45.2	-84.4	
vi Loan Receipts	69 109.8	187 627.4	100 158.5	91 809.1	165 277.5	132 934.3	24.3	80.0	
Domestic	38 006.0	57 613.4	67 680.0	52 465.2	139 114.0	106 264.9	30.9	165.2	
External	31 103.8	130 014.0	32 478.5	39 343.8	26 163.5	26 669.4	-1.9	-33.5	
vii Divestment	14 604.7	0.0	0.0	0.0	0.0	0.0	n/ap	n/ap	
viii Other Inflows (inc'ds PCDF)	0.0	11 400.1	14 524.5	82 864.3	2 210.9	6 123.7	-63.9	-97.3	
ix Other Outflows (incl'ds BOJ Recapitalization)	0.0	0.0	22 488.2	16 530.9	31 903.6	32 197.4	-0.9	93.0	
x Amortization	61 390.0	204 317.7	116 599.5	149 249.6	139 649.3	140 985.3	-0.9	-6.4	
Domestic	25 859.3	149 768.8	74 902.7	65 295.9	106 966.7	106 956.1	0.0	63.8	
External	35 530.7	54 549.0	41 696.9	83 953.7	32 682.6	34 029.3	-4.0	-61.1	
xi Overall Balance (Surplus +/Deficit -) - includes loan receipts and amortisation payments (iv + vi + vii + viii - ix - x)	-1 164.9	-3 968.3	-5 212.9	33 025.1	-74 317.9	-108 364.3	-31.4	-325.0	
Memo Items									
Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	5 971.6	30 106.0	62 086.6	63 513.0	-33 845.3	-35 726.9	-5.3	-153.3	
Debt Servicing (iii + x)	161 667.5	299 537.8	205 092.1	237 827.5	227 435.7	227 303.5	0.1	-4.4	
Domestic	70 340.3	195 252.5	109 394.6	98 800.9	142 417.7	139 498.8	2.1	44.1	
External	91 327.2	104 285.3	95 697.5	139 026.7	85 018.1	87 804.8	-3.2	-38.8	

n/ap - not applicable

p - preliminary

Source: Ministry of Finance and the Public Service

BOX 8.1
SELECTED ACCOUNT ITEMS FOR ORIGINALLY APPROVED BUDGET, THE FIRST AND SECOND SUPPLEMENTARY ESTIMATES FOR FY2020/21 (\$ MILLION)

	Originally Approved Budget	First Supplementary Estimates	Second Supplementary Estimates
Revenue & Grants	660 907.1	579 886.0	585 100.0
Tax Revenue	588 807.2	510 051.0	515 580.1
Non-Tax Revenue	67 290.9	65 025.9	65 069.0
Capital Revenue	336.0	336.0	310.6
Grants	4 337.3	4 337.4	3 994.2
Expenditure	661 017.7	642 841.1	658 014.4
Recurrent Expenditure	586 814.5	596 238.3	604 500.1
Programmes	232 802.7	236 930.8	242 978.6
Compensation of Employees	221 357.5	221 657.7	225 268.5
Interest	132 654.2	137 649.8	136 253.0
Capital Expenditure	74 203.3	46 602.8	53 514.3
Fiscal Surplus(+)/Deficit(-)	-110.6	-62 955.1	-72 914.5
Primary Surplus(+)/Deficit(-)	132 543.6	74 694.7	63 338.6
Loan Receipts	143 602.9	147 827.8	188 624.4
Amortization	155 189.7	158 048.2	158 555.6

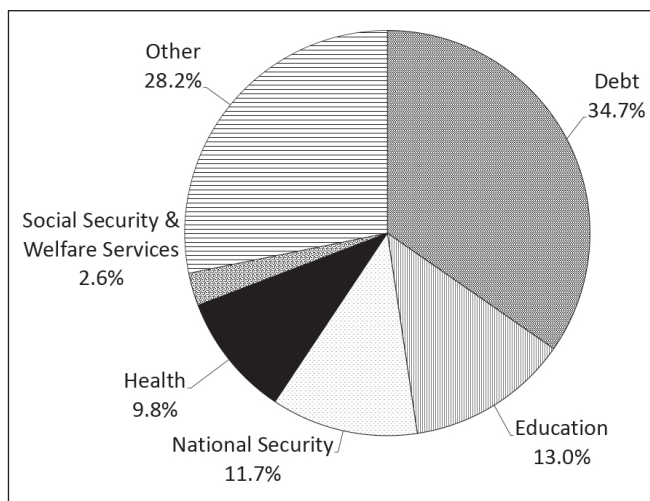


FIGURE 8B: BUDGETARY ALLOCATION FY2020/21

allocation towards Health was due in part to the additional needs of the health sector associated with the COVID-19 pandemic.

A total of \$99.7 billion was allocated to Public Order & Security Services (National Security), which accounted for 11.7 per cent of the total budget. This represented a decrease of \$6.1 billion and 0.6 percentage point, respectively, compared with the revised estimates of FY2019/20. The allocation to expenditure on Public Order & Security Services was disaggregated as:

- Jamaica Defence Force – down 13.6 per cent to \$32.0 billion

- Police Services – down 2.1 per cent to \$49.9 billion
- Justice – down 6.1 per cent to \$9.0 billion
- Correctional Services – up 7.3 per cent to \$8.7 billion.

FISCAL PERFORMANCE

Budget versus Actual Outcome (Second Supplementary Estimates)

Central Government operations generated a fiscal deficit of \$70.3 billion relative to a budgeted deficit of \$74.2 billion for the period April–December 2020 (Table 8.1b). This was due to lower than programmed Expenditure (above the line) by \$3.6 billion to \$468.5 billion, outweighed by higher than budgeted Revenue & Grants by \$0.4 billion to \$398.3 billion. In addition, the primary balance of \$17.5 billion was \$5.5 billion higher than programmed.

The higher than budgeted out-turn for Revenue & Grants was due to the components Non-Tax Revenue and Grants, which were higher than budget by \$0.6 billion and \$0.5 billion, respectively (Table 8.3b). These higher than budgeted

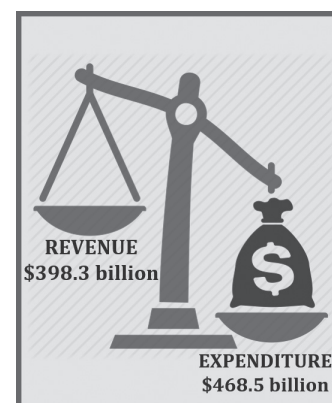


TABLE 8.2
FUNCTIONAL CLASSIFICATION OF RECURRENT AND CAPITAL EXPENDITURE
FY2016/17 TO FY2020/21
(\$ MILLION)

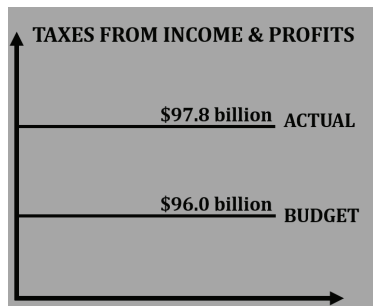
	FY2016/17	FY2017/18	FY2018/19	FY2019/20 ^r	FY2020/21 ^p
A.GENERAL SERVICES					
1 General Administration					
Economic and Management	18 864.2	43 917.6	62 030.9	68 605.6	83 384.4
Foreign Affairs	4 489.5	7 195.0	4 499.3	5 122.4	4 540.5
Public Debt Management	224 540.8	378 908.0	286 415.4	317 657.5	294 808.6
Other General Public Services	52 968.1	57 765.4	104 183.2	67 463.3	67 128.5
Total General Administration	300 862.6	487 786.1	457 128.7	458 848.8	449 862.0
2 Public Order and Security Services					
Defence	17 224.2	18 764.2	18 211.1	37 037.5	32 004.9
Police	39 746.5	40 531.3	42 972.1	50 975.0	49 886.1
Justice	7 370.8	9 952.2	9 890.1	9 614.8	9 032.0
Correctional	7 822.9	7 260.1	6 721.4	8 152.6	8 747.5
Total Public Order and Security Services	72 164.5	76 507.7	77 794.7	105 780.0	99 670.5
TOTAL A - General Services	373 027.1	564 293.8	534 923.4	564 628.8	549 532.5
B.ECONOMIC SERVICES					
1 Industry and Commerce	2 897.7	5 467.8	5 291.1	5 224.8	4 690.0
2 Agriculture, Forestry and Fishing	8 420.6	11 392.5	10 910.1	10 458.4	11 251.6
3 Transport and Communication	19 749.9	32 212.5	33 013.5	41 928.0	34 508.3
4 Fuel and Energy	1 302.8	2 283.9	2 272.4	1 831.0	971.6
5 Environmental Protection and Conservation	2 501.3	2 944.9	3 147.8	3 881.2	3 471.7
6 Other Economic Services	4 411.4	12 311.0	13 723.0	15 380.9	14 977.1
TOTAL B - Economic Services	39 283.8	66 612.7	68 358.1	78 704.2	69 870.3
C.SOCIAL AND COMMUNITY SERVICES					
1 Education	95 067.0	98 721.2	102 234.8	110 045.1	110 243.3
2 Health	59 389.3	63 839.9	68 637.5	73 745.0	83 756.7
3 Housing	732.2	651.0	643.5	636.6	953.1
4 Recreation, Culture and Religion	4 541.7	4 142.1	5 061.3	4 437.5	3 770.2
5 Social Security and Welfare Services	12 045.8	10 573.0	14 673.8	15 594.6	22 231.6
6 Water Supply	1 125.0	773.9	811.8	1 284.2	1 003.4
7 Other Social and Community Services	7 532.0	5 657.6	7 219.0	9 995.6	8 968.3
TOTAL C - Social and Community Services	180 433.1	184 358.6	199 281.7	215 738.7	230 926.5
TOTAL	592 743.9	815 265.1	802 563.1	859 071.6	850 329.3

p – preliminary

r – revised

Source: Ministry of Finance and the Public Service Financial Statement and Revenue Estimates 2020/21

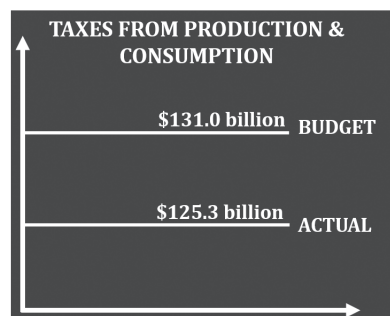
out-turns combined, outweighed lower than budgeted inflow for Tax Revenue, as the components Bauxite Levy and Capital Revenue were both in line with budget. Tax Revenue inflows of \$346.5 billion was 0.2 per cent lower than budgeted due to a shortfall from the category Production & Consumption, which outweighed the excess recorded for Income & Profits and International Trades taxes. This lower than programmed out-turn for tax revenue ended the buoyancy trend of higher than programmed tax revenue, reflecting the stronger than anticipated negative impact of COVID-19 on the economy and the fiscal accounts.



Revenue inflow for Income & Profits totalled \$97.8 billion, \$1.8 billion higher than budgeted (see Table 8.3b). This out-turn was due to higher than budgeted revenue inflows from the subcategories Tax on Interest, Tax on Dividend and PAYE.

Tax on Interest recorded inflow of \$14.3 billion and represented an excess of \$2.3 billion or 19.3 per cent, partly due to higher than budgeted domestic interest payments and higher than budgeted flows from the private sector. Tax on Dividend (\$2.1 billion) was \$1.1 billion higher than budgeted and PAYE recorded inflows of \$47.7 billion, which was \$0.6 billion above budget. The higher than budgeted Tax on Dividend was in part due to the payment of arrears by one entity. This combined higher than budgeted out-turn outweighed the shortfalls recorded for Other Companies and Other Individuals which were, respectively, \$2.2 billion and \$0.1 billion lower than budgeted. The lower than budgeted inflow for these subcategories was due to lower than expected profits of firms and income of self-employed persons.

An inflow of \$125.3 billion was recorded for Production & Consumption, \$5.7 billion lower than budgeted. This out-turn was primarily due to lower than budgeted inflows for the subcategory GCT (Local) of \$67.2 billion, a shortfall



of \$4.8 billion compared with budget, due to higher than expected refund payments, as well as lower than expected consumption associated with the continued negative impact of COVID-19. Also

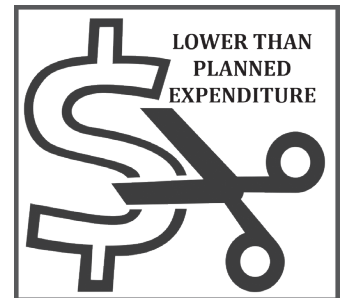
contributing to lower than budgeted inflow for Production & Consumption were the subcategories Education Tax, by \$0.8 billion; Special Consumption Tax (SCT) {Local}, by \$0.5 billion; Betting, Gaming & Lottery, by \$0.3 billion; and Contractors' Levy, by \$0.1 billion.

International Trade taxes totalled \$123.5 billion, \$3.2 billion higher than budgeted (see Table 8.3b). Higher than budgeted revenue from all subcategories except SCT (Imports), which was \$2.0



billion lower than budgeted with total inflows of \$29.9 billion accounted for the out-turn. This lower than budgeted inflow was due to lower than expected import of refined petroleum products. Primarily outweighing the out-turn of SCT (Imports) was higher than budgeted GCT (Imports) and Custom Duty. GCT (Imports) was \$56.5 billion (\$2.9 billion higher than budget) and Custom Duty of \$29.6 billion (\$1.9 billion higher than budgeted). The performance of both GCT (Imports) and Custom Duty was impacted by a higher than anticipated value of imports for the review period.

Total Expenditure was \$640.1 billion, \$5.2 billion lower than programmed. This was due to lower than planned expenditure for all components—Expenditure (above-the-line), Other Outflows, and Amortization.



Expenditure (above-the-line) totalled \$468.5 billion, \$3.6 billion below budget. This lower than programmed spending by Central Government was attributed to Recurrent Expenditure (\$432.1 billion) being \$1.5 billion lower than programmed and Capital Expenditure (\$36.4 billion) being \$2.1 billion lower than planned. The lower Recurrent Expenditure was due to less than planned expenditure for the categories Programmes and Compensation of Employees, which were \$2.6 billion and \$0.4 billion, respectively, lower than programmed. The lower than programmed expenditure for Programmes was due to delays in payments for the COVID-19 Allocation of Resources for Employees (CARE) programme and procurement of goods and services by Ministries, Departments & Agencies. The category Interest recorded spend of \$87.8 billion which was \$1.5 billion higher than programmed. This was due to the combined

effect of higher than planned spending on Domestic interest (by \$2.9 billion) and lower than planned spending on External interest (by \$1.4 billion).

Financing

Amortization payments of \$139.6 billion was \$1.3 billion lower than programmed. This primarily reflected lower than planned External Amortization (\$32.7 billion) by

\$1.3 billion, as Domestic Amortization (\$107.0 billion) was broadly in line with budget. Loan Receipts which totalled \$165.3 billion was \$32.3 billion higher than budgeted, reflecting higher than budgeted inflow from the issuance of Benchmark Investment Notes (BINs) in October 2020. Domestic Loan

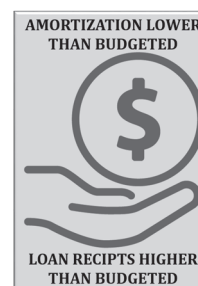


TABLE 8.3a
TAX REVENUE COLLECTIONS, FY2016/17 TO FY2020/21
(\$MILLION)

	ACTUAL				BUDGET FY2020/21
	FY2016/17	FY2017/18	FY2018/19	FY2019/20	
TOTAL REVENUE & GRANTS	499 879.9	560 773.6	628 985.2	649 759.2	585 100.0
i) TAX REVENUE	458 323.4	496 894.6	542 919.4	579 397.0	515 580.1
Income and Profits	136 024.6	131 111.4	143 519.1	159 726.1	158 228.6
Bauxite/Alumina	0.0	0.0	0.0	0.0	0.0
Other Companies	51 791.2	61 507.5	61 323.1	68 282.8	68 125.5
PAYE	64 955.0	53 662.2	58 037.3	66 670.1	66 135.9
Tax on Dividend	1 560.7	1 912.2	2 205.7	2 249.4	1 123.9
Other Individuals	5 188.8	5 304.0	5 164.9	5 827.9	5 621.5
Tax on Interest	12 528.8	8 725.4	16 788.0	16 695.8	17 221.7
Production and Consumption	148 313.9	175 895.2	191 452.7	201 343.1	189 076.3
Minimum Business Tax	771.8	973.0	1 081.1	290.1	45.8
SCT (Local)	18 230.8	27 888.7	25 904.8	30 339.7	29 217.5
Environmental Levy	376.9	501.1	537.4	616	576.1
Motor Vehicle Licenses	3 199.0	3 963.9	4 574.3	4 746.1	4 503.5
Other Licenses	500.9	1 053.2	1 667.0	2 585.2	2 012.6
Quarry Tax	0.0	55.3	68.9	83.0	80.6
Betting, Gaming and Lottery	2 755.6	3 161.3	5 551.1	6 261.0	6 853.8
Accommodation Tax	2 353.8	2 619.3	2 742.0	2 917.4	631.4
Education Tax	23 665.0	26 630.2	29 167.8	32 589.2	31 944.5
Telephone Call Tax	4 241.9	3 712.7	3 185.3	3 640.8	2 733.5
Contractors Levy	1 239.2	1 978.3	2 512.6	2 160.3	2 110.4
GCT(Local)	78 174.7	90 817.0	100 695.0	109 303.8	103 776.8
Stamp Duty(Local)	12 804.4	12 541.3	13 765.4	5 810.4	4 589.6
International Trade	173 984.9	189 888.0	207 947.6	218 327.9	168 275.2
Customs Duty	35 581.2	38 201.8	42 500.2	45 352.0	37 901.8
Stamp Duty	2 260.12	2 429.7	2 879.1	2 891.6	1 791.1
Travel Tax	14 527.7	19 023.0	20 756.8	21 900.4	4 693.0
GCT(Imports)	73 734.6	78 924.8	87 202.3	92 497.5	74 795.8
SCT (Imports)	45 085.1	48 235.0	51 164.7	52 168.3	45 995.1
Environmental Levy	2 796.1	3 073.6	3 444.5	3 518.1	3 098.5
ii) NON-TAX REVENUE	33 754.1	53 249.9	72 850.5	64 505.2	65 069.0
iii) BAUXITE LEVY	1 940.9	127.5	136.5	0.0	146.1
iv) CAPITAL REVENUE	568.6	4 887.1	2 531.7	1 200.2	310.6
v) GRANTS	5 292.8	5 614.4	10 547.0	4 656.8	3 994.2

Source: Ministry of Finance and the Public Service

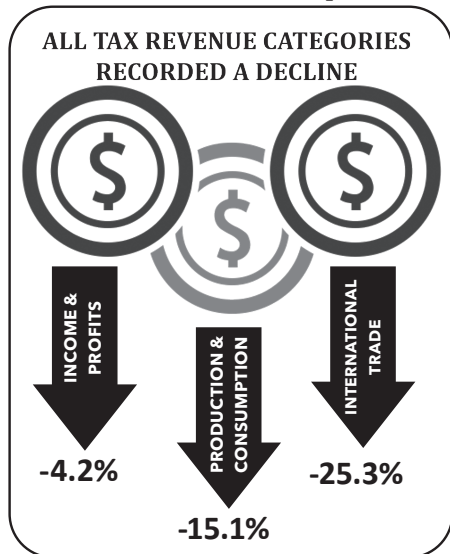
Receipts of \$139.1 billion was \$32.8 billion higher than budgeted and External Loan Receipts of \$26.2 billion was \$0.5 billion lower than budget. The out-turn for Domestic Loan Receipts was due to higher than anticipated uptake of debt securities.

Actual Outcome April–December 2020 versus Actual Outcome April–December 2019

Central Government operations generated a fiscal deficit of \$70.3 billion compared with a fiscal surplus of \$24.1 billion in the corresponding period of 2019 (see Table 8.1b). This deterioration in the fiscal out-turn resulted from a \$70.9 billion decrease in Revenue & Grants and a \$23.5 billion increase in Expenditure (above-the-line). The Primary Surplus out-turn of \$17.5 billion represented a decrease of \$95.2 billion (or 84.4 per cent) relative to the corresponding period of 2019. This overall decline in the fiscal accounts was primarily attributable to the impact of the COVID-19 pandemic.

The reduced Revenue & Grants of \$398.3 billion was due to declines in Tax Revenue, Non-Tax Revenue and Capital Revenue (see Table 8.1b). The largest contributor to the decline in revenue was Tax Revenue (\$346.5 billion), which recorded a decrease of \$68.3 billion, resulting from reductions in all categories: Income & Profits (by \$4.3 billion); Production & Consumption (by \$22.2 billion); and International Trade (by \$41.8 billion) [see Table 8.3b]. The component Grants recorded inflow of \$4.0 billion, an increase of 2.1 per cent compared with the corresponding period of 2019.

The decrease to \$97.8 billion in Income & Profits was due to lower tax revenue inflows from the subcategories Other Companies (\$31.5 billion) and Other Individuals (\$2.2 billion), which declined by \$6.6 billion and \$0.4 billion, respectively. The lower revenue from both subcategories was attributed to the impact of COVID-19 on the



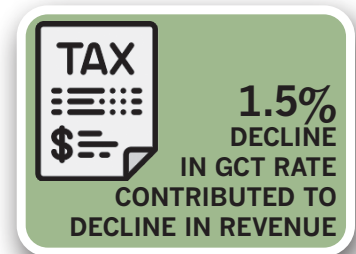
profitability of most firms and the income of self-employed individuals. Tempering the decline of the category was increases from the subcategories Tax on Interest, by \$1.7 billion to \$14.3 billion; PAYE, by \$0.6 billion to \$47.7 billion;

and Tax on Dividend, by \$0.5 billion to \$2.1 billion. The higher inflows from PAYE—despite a decrease in the unemployed labour force—can be associated with taxes paid on redundancy payments directly related to layoffs resulting from COVID-19. The subcategory Bauxite Levy did not record any inflow, similar to the corresponding period of 2019.

The category Production & Consumption recorded revenue of \$125.3 billion, \$22.2 billion lower than in the corresponding period of 2019 (see Table 8.3b). This decline primarily reflected reduced inflows from the subcategories GCT (Local) {by \$14.1 billion to \$67.2 billion}; SCT (Local) {by \$3.8 billion to \$18.6 billion}; Education Tax (by \$1.8 billion to \$21.4 billion); and Accommodation Tax (by \$1.5 billion to \$0.6 billion). The decrease in GCT (Local) was due to reduced consumption of goods and services and the lowering in the GCT rate from 16.5 per cent to 15.0 per cent, while SCT (Local) was impacted by lower production (by 22.3 per cent) at the local oil refinery and a decline in alcohol production for hotel and entertainment activities. Reduced revenue for Education Tax was affected by an overall decline in the employed labour force and the lower Accommodation Tax was associated with a decrease of 85.8 per cent in Foreign National arrivals.

International Trade revenue inflow of \$123.5 billion was a decline of \$41.8 billion, due to decreases in all subcategories (see Table 8.3b). The largest absolute declines were recorded by GCT (Imports), by \$14.2 billion; Travel Tax, by \$12.8 billion; SCT (Imports), by \$8.9 billion; and Custom Duty, by \$4.9 billion. An overall decline in domestic demand for goods reflected in lower merchandise imports (by 31.6 per cent April–November 2020 compared with April–November 2019) contributed to the reduced revenue from GCT (Imports) and Custom Duty. A decline of 80.0 per cent in the value of refined petroleum products contributed to the decline in SCT (Imports). Also contributing to the decline in GCT (Imports) was the 1.5 percentage point reduction in the consumption tax rate relative to the corresponding period of 2019. For Travel Tax, inflows were negatively influenced by an 84.5 per cent decrease in stopover arrivals compared with the corresponding period of 2019. A 6.9 per cent depreciation in the average exchange rate of the Jamaican dollar during April–December 2020 compared with the corresponding period of 2019 tempered the overall decline in the category.

Expenditure (above-the-line) totalled \$468.5 billion, an increase of 5.3 per cent compared with the corresponding period of 2019 (see Table 8.1b). This was due to a 6.7 per cent increase to \$432.1 billion in Recurrent Expenditure



which outweighed a decline of 9.4 per cent to \$36.4 billion in Capital Expenditure. The higher Recurrent Expenditure was due to increases of \$19.8 billion and \$8.3 billion for Programmes and Compensation of Employees, respectively, which outweighed a decline of \$0.8 billion in Interest payments. The increase in spend on Programmes was due to

the allocation of resources to social assistance programmes including the CARE programme and COVID-19 related expenditures by the MOHW. The lower Capital Expenditure was the result of delays in the implementation of some projects which were impacted by measures implemented to minimize the spread of COVID-19.

TABLE 8.3b
TAX REVENUE COLLECTIONS, APRIL–DECEMBER 2016–2020
(\$MILLION)

	Apr–Dec 2016	Apr–Dec 2017	Apr–Dec 2018	Apr–Dec 2019	Apr–Dec 2020 ^P	Budget Apr–Dec 2020	% Change Actual/ Budget	% Change Actual 2020/ Actual 2019
TOTAL REVENUE & GRANTS	352 039.9	390 947.6	448 772.7	469 156.3	398 261.6	397 883.4	0.1	-15.1
i) TAX REVENUE	322 067.9	353 063.2	388 666.1	414 749.6	346 492.4	347 237.0	-0.2	-16.5
Income and Profits	85 448.9	78 379.7	90 772.3	102 021.0	97 768.0	95 997.1	1.8	-4.2
Bauxite/Alumina	0.0	0.0	0.0	0.0	0.0	0.0	n/ap	n/ap
Other Companies	23 586.3	32 226.3	32 145.4	38 072.8	31 454.5	33 617.1	-6.4	-17.4
PAYE	47 765.1	37 689.2	41 498.9	47 177.4	47 735.3	47 089.1	1.4	1.2
Tax on Dividend	1 078.6	1 318.7	1 393.6	1 555.6	2 063.4	969.8	112.8	32.6
Other Individuals	2 002.6	2 240.5	2 109.0	2 551.4	2 187.2	2 315.2	-5.5	-14.3
Tax on Interest	11 016.2	4 904.9	13 625.4	12 663.8	14 327.6	12 005.8	19.3	13.1
Production and Consumption	106 670.6	129 388.2	140 866.8	147 468.8	125 268.7	131 003.3	-4.4	-15.1
Minimum Business Tax	625.8	824	927.9	219.2	88.0	45.8	92.1	-59.9
SCT (Local)	13 296.9	20 571.3	18 673.0	22 406.1	18 628.3	19 142.4	-2.7	-16.9
Environmental Levy	265.3	361.7	386.4	424.7	446.3	422.0	5.8	5.1
Motor Vehicle Licenses	2 302.4	2 870.7	3 240.7	3 529.6	3 311.7	3 264.1	1.5	-6.2
Other Licenses	324.1	745.1	820.5	1 182.1	1 325.1	1 304.4	1.6	12.1
Quarry Tax	0.0	39.2	49.4	61.1	75.0	67.3	11.5	22.8
Betting, Gaming and Lottery	2 142.1	2 025.2	4 068.7	4 669.7	4 571.8	4 871.6	-6.2	-2.1
Accommodation Tax	1 719.1	1 962.9	1 979.8	2 114.4	597.3	555.1	7.6	-71.8
Education Tax	16 927.4	19 127.1	21 037.6	23 163.3	21 386.9	22 137.3	-3.4	-7.7
Telephone Call Tax	3 541.9	2 843.1	2 377.2	2 759.6	2 737.5	2 344.7	16.8	-0.8
Contractors Levy	901.8	1 530.7	1 962.0	1 600.5	1 263.9	1 364.5	-7.4	-21.0
GCT (Local)	54 884.2	66 913.1	74 697.7	81 313.5	67 175.1	71 998.7	-6.7	-17.4
Stamp Duty (Local)	9 739.4	9 574.2	10 645.8	4 025.1	3 661.9	3 485.2	5.1	-9.0
International Trade	129 948.3	145 295.3	157 027.0	165 259.8	123 455.7	120 236.7	2.7	-25.3
Customs Duty	27 026.1	29 182.2	32 223.1	34 532.3	29 600.2	27 685.5	6.9	-14.3
Stamp Duty	1 657.2	1 817.9	2 090.1	2 163.4	1 427.7	1 263.5	13.0	-34.0
Travel Tax	9 988.2	14 119.4	15 210.3	16 407.0	3 614.2	3 593.0	0.6	-78.0
GCT (Imports)	55 708.3	59 882.5	66 001.9	70 638.9	56 456.3	53 513.2	5.5	-20.1
SCT (Imports)	33 480.7	38 002.7	38 880.9	38 771.1	29 892.6	31 857.2	-6.2	-22.9
Environmental Levy	2 087.9	2 290.6	2 620.7	2 747.1	2 464.6	2 324.3	6.0	-10.3
ii) NON-TAX REVENUE	22 854.2	32 202.8	50 639.0	49 680.0	47 772.8	47 178.1	1.3	-3.8
iii) BAUXITE LEVY	1 830.9	127.5	0.0	0.0	0.0	0.0	n/ap	n/ap
iv) CAPITAL REVENUE	416.0	2 187.9	2 511.2	826.3	22.1	22.1	0.0	-97.3
v) GRANTS	4 870.9	3 366.3	6 956.4	3 893.8	3 974.2	3 446.1	15.3	2.1

n/ap – not applicable

p – preliminary

Source: Ministry of Finance and the Public Service

Financing

A total \$165.3 billion was recorded for Loan Receipts, reflecting an increase of \$73.5 billion compared with the corresponding period of 2019 (see Table 8.1b). This out-turn was an increase of \$86.6 billion in Domestic Loan Receipts which outweighed a decline of \$13.2 billion in External Loan Receipts. The increase in Domestic Loan Receipts was due to the reopening and over subscription of Fixed-Rate Benchmark Investment Notes by the GOJ to the market during the review period compared with April–December 2019. Amortization was \$139.6 billion, \$9.6 billion lower than the comparable period of 2019. This was due to lower External Amortization (by \$51.3 billion to \$32.7 billion) outweighing higher Domestic Amortization (by \$41.7 billion to \$107.0 billion).

Debt Stock

The total stock of debt at the end of December 2020 was \$2 072.5 billion, \$73.0 billion higher than at the end of December 2019. The higher debt stock was due to a 6.1 per cent increase in the Central Government portion of the debt stock, which outweighed a



decrease of 7.1 per cent in Public Bodies Debt and a 15.8 per cent increase in total Cross Holdings.⁶ The Central Government portion of the stock was disaggregated as follows: External Debt of \$1 248.6 billion, an increase of 7.2 per cent and Domestic Debt of \$776.5 billion, an increase of 4.4 per cent, while the Public Bodies portion comprised \$139.6 billion in Non-Guaranteed Debt (down 10.5 per cent) and \$93.1 billion on Guaranteed Debt (down 1.4 per cent). The increase in the domestic debt stock was primarily due to special distributions of BINs to the Bank of Jamaica during the January–March 2020 quarter, accounting for 54.9 per cent of the overall increase in the domestic debt stock. The higher external debt stock was related to valuation effects associated with the depreciation of the Jamaican dollar.

The debt-to-GDP ratio as at the end of December 2020 was 105.4 per cent, which represented an 10.6 percentage point increase relative to December 2019. Notwithstanding the increased ratio, it is projected that the macro-fiscal position of the economy will improve to aid in restoring a downward trend in the debt-to-GDP ratio consistent with meeting the target 60.0 per cent or lower by FY2027/28.

**DEBT TO
GDP
RATIO
105.4%**

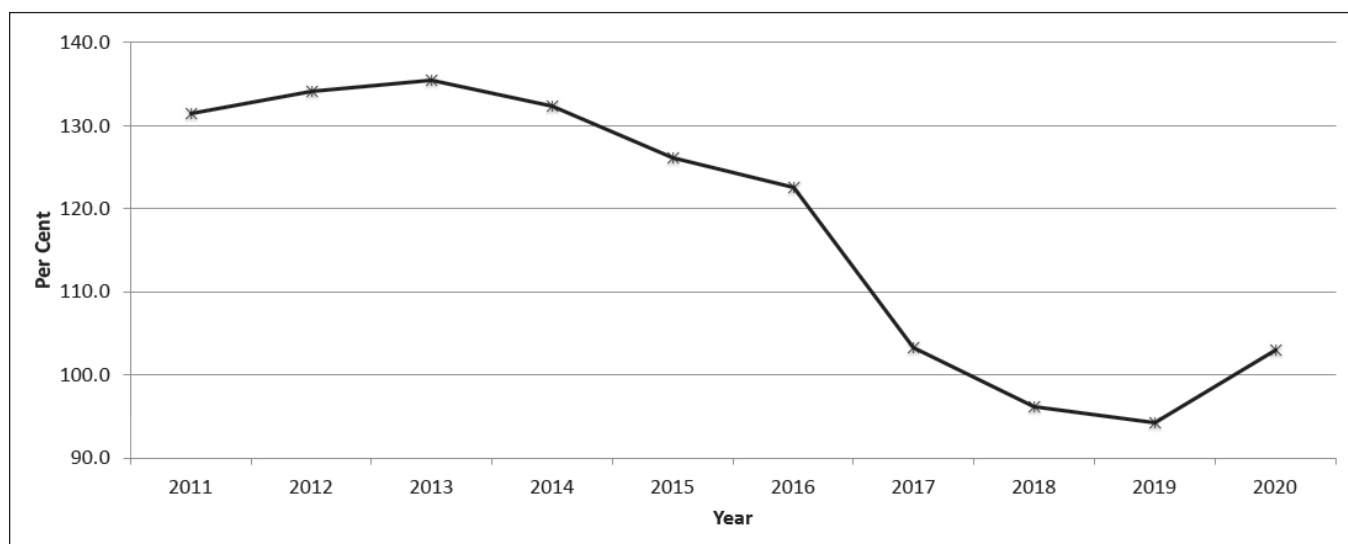


FIGURE 8C: ANNUAL DEBT-TO-GDP RATIO, 2011–2020

6. Cross Holdings refers to the consolidated debt between the Government of Jamaica and public bodies, therefore, an increase in the total cross holdings will lead to a decrease in the overall public debt stock. Net Cross Holdings = Public Bodies Debt - Cross Holdings

International Monetary Fund (IMF) Rapid Financing Facility

During April 2020, Jamaica applied for and received access to the IMF's Rapid Financing Facility. Access was granted at the maximum available of 100.0 per cent of quota or approximately US\$520.0 million. These resources were disbursed to the Bank of Jamaica in May 2020 and are being used for Balance of Payments Support.

OUTLOOK

Third Supplementary Estimates

The Third Supplementary Estimates for FY2020/21 is to be tabled in Parliament by February 2021. Based on the out-turn of Central Government operations for April–December 2020, a reduction in the allocation to Expenditure (above-the-line) is expected to mitigate an expected shortfall in Revenue & Grants compared with the estimates tabled in September 2020. This shortfall will result in a larger fiscal deficit relative to the estimates tabled in September 2020.

Policy Initiatives

Given the continued impact of COVID-19 on the operations of Central Government, there will be a prioritization of social expenditure while maintaining practical management of limited public resources and the debt stock as a share of GDP. Affiliated with this central goal is the GOJ's revenue strategy, which is executed through the efforts of the primary revenue collecting agencies—TAJ and JCA.

Despite the challenges posed by the COVID-19 pandemic, TAJ will continue its implementation of strategies aimed at continued improvement in all five strategic objectives:

- *Continuously improving voluntary compliance* – focus on improving the health of the tax system by addressing the shortfalls in tax compliance with respect to registration, filing, payment and accuracy of reporting.
- *Engendering a customer-centric organization* – focus on the needs of the taxpayer by providing enhanced tools to better meet their tax and business obligations through the continued usage and improvement of RAiS and other eServices including a mobile app that provides easier access to clients to selected products and services.

- *Institutional strengthening of the organization* – focus on enhancing its business processes, technology and physical infrastructure to effect improvements in the quality and delivery of services. Develop and implement initiatives to strengthen policies/protocols relating to the management of information, assets, static security, digital surveillance, and staff/visitor access.
- *Building human capital synergies and culture* – build the capacity of human capital, reinforce guiding principles and encourage the core values that will lead to a desired culture
- *Enhanced corporate governance* – focus on strengthening corporate governance by improving accountability and transparency.

The JCA's reform initiatives for FY2021/22 and the medium-term will continue under the previously identified strategic objectives and will include the:

Trade Facilitation and Revenue Collection Sub-Programme – development and implementation of compliance modules through the Automated System for Customs Data (ASYCUDA) enhancement projects such as the:

- Queen's Warehouse Module to enable timely disposal of overtime goods from transit sheds to support revenue optimization
- Post Clearance Audit Case Management Module to improve efficiency with the automation of JCA post-audit cases
- Valuation (ASYVAL) Module to improve compliance in the valuation of goods and calculation of customs duties with greater monitoring through automation.
 - *Advance Ruling Programme* – to mitigate inconsistent classifications and origin decision by traders to foster greater compliance and trade facilitation
 - *Border Control Operations Sub-Programme* – develop and implement border protection modules through the ASYCUDA enhancement projects, including an:
 - Enforcement Module to improve intra-agency information and intelligence sharing
 - Advance Passenger Information System (APIS) Module to improve the efficiency of risk assessment in passenger processing. ■

FINANCE AND INSURANCE SERVICES

INTRODUCTION

The performance of the Finance and Insurance Services industry was affected by decreased economic activity, lower levels of business and consumer confidence, reductions in employment levels and reduced investor appetite. The poor economic condition resulted from the adverse effects of the COVID-19 pandemic and measures to curb its spread. Consequently, Real Value Added (RVA) recorded a decline of 3.8 per cent relative to 2019, the first decline since 2012, as the categories Monetary Intermediation, Other Financial Intermediation and

Insurance Services declined (Figure 9A). The profitability of Deposit Taking Institutions was impacted by a reduction in their net interest income and lower revenue generated from fee & commission income as a result of fewer transactions and a shift to lower priced digital transactions. The Bank of Jamaica (BOJ) maintained its benchmark Overnight Policy Rate at 0.50 per cent relative to December 2019. The Central Bank maintained its accommodative monetary policy stance with the aim of inducing economic recovery and allowing inflation to remain within the target range of 4.0 per cent to 6.0 per cent.

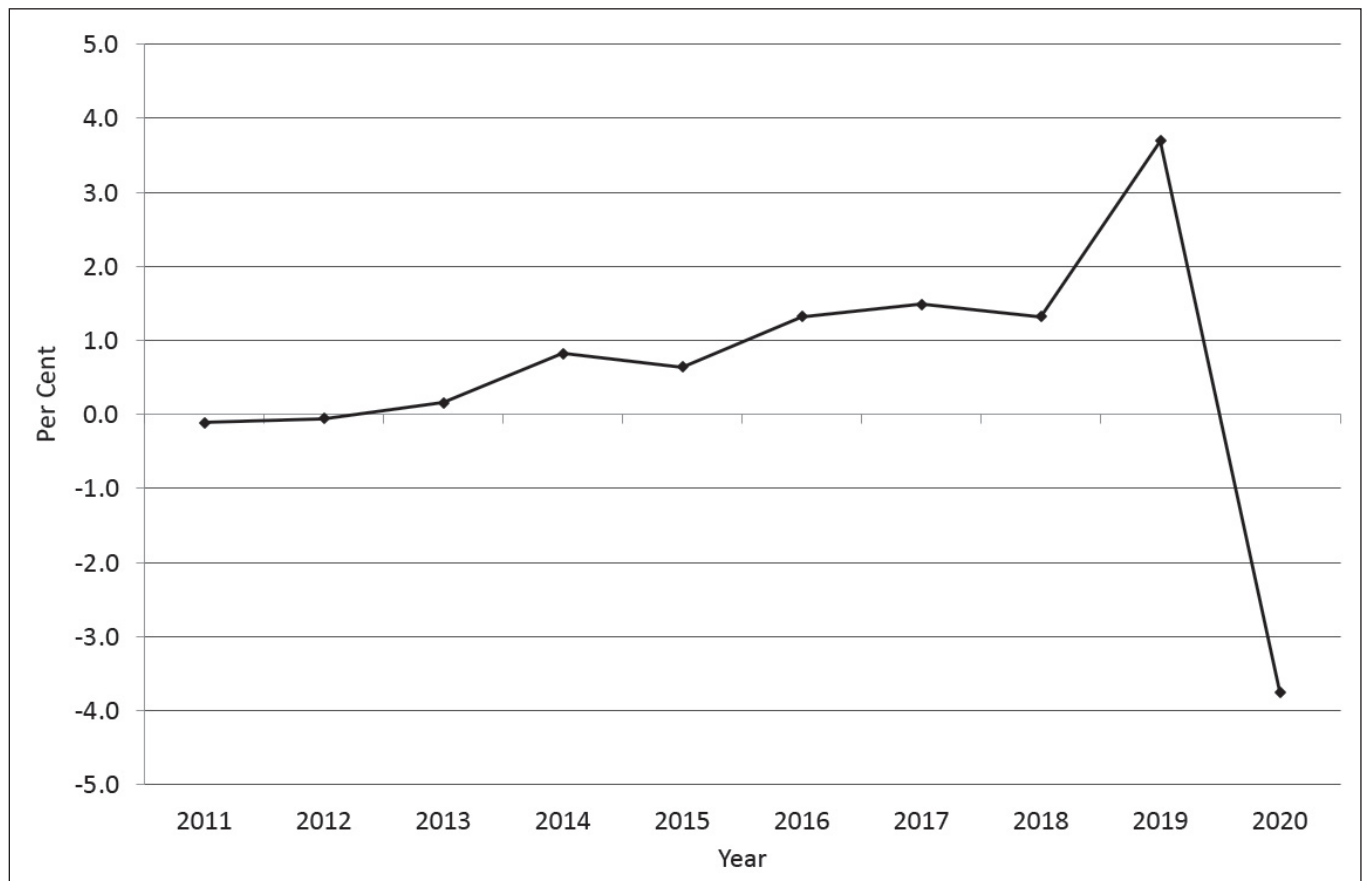


FIGURE 9A: REAL VALUE ADDED GROWTH RATE FOR FINANCE & INSURANCE SERVICES, 2011–2020

LEGISLATIVE AND POLICY DEVELOPMENTS

During 2020, Parliament passed legislation governing institutions supervised or regulated by the BOJ and

Financial Services Commission (FSC). Work continued on several pieces of legislation and progress was made on other initiatives as follows:

LEGISLATIVE, REGULATORY AND POLICY DEVELOPMENTS		
Act/Regulation/Bill/Policy	Purpose	Status
Bank of Jamaica		
The Bank of Jamaica (Amendment) Act, 2020	To clarify the mandate of the Central Bank and to strengthen the Central Bank's governance framework, which is underpinned by financial independence from the central government It entrenches price stability and financial system stability as the Bank's primary objective. It outlines the requirements necessary to be on the Board and in executive management positions and defines the composition and term limits for Board positions	The Act was passed in December.
The Data Protection Act, 2020	To protect Jamaicans from unsolicited, disclosure of their personal information	The Act was passed in June.
The Financial Institutions Resolution Bill	To create an approach to resolution under which systematically important non-viable financial institutions are resolved through the use of administrative mechanisms	Bill in Development
The Cooperative Societies (Amendment) Bill	To bring credit union cooperative societies under the regulatory arm of the Ministry of Finance and the Public Service (MOFPS) and the BOJ. It will restrict the deposit-taking activities of cooperative societies to those which operate as credit unions	Pending Amendment
The Credit Unions (Special Provisions) Bill	To bring credit unions under the Bank of Jamaica's prudential supervisory regime in a stand-alone principal statute instead of in subsidiary legislation (as Regulations under the Bank of Jamaica Act)	Pending Amendment
Microcredit Bill	To create legislation for the regulatory and licensing requirements for microcredit institutions. The aim is for the BOJ to be the regulator and the Consumer Affairs Commission to oversee consumer protection	The Bill was re-tabled in Parliament in December and is expected to be passed in January 2021.
Anti-Money Laundering, Countering the Financing of Terrorism and Proliferation of Weapons of Mass Destruction (AML/CFT/PF) Rules	To enhance compliance with the international standards on AML/CFT/PF These Rules will, among other things: Codify the risk-based examination and oversight processes pertaining to the AML/CFT supervision functions of the Bank of Jamaica Identify the areas in the BOJ's AML/CFT Guidance Notes with which compliance will be mandated and allow BOJ to directly penalize those entities in breach of those requirements	The rules are now being developed
Ministry of Finance and the Public Service		
Income Tax (Amendment) Bill and the Pensions (Superannuation Funds & Retirement Schemes) (Amendment) Bill	To ensure that there is a sufficient level of pension benefits, foster security benefits for participants and ensure an effectively regulated private pensions industry	Latest draft received from the Chief Parliamentary Counsel (CPC) in September after consultations with the Financial Services Commission and Tax Administration of Jamaica
Insurance Amendment) Act	To allow for the development of a microinsurance legislative framework	MOFPS received additional proposals from the FSC and the Attorney General Chambers provided their comments
Deposit Insurance Coverage Limit	To insure the savings of depositors of member institutions up to a limit as a means of protection against bank failure	Coverage Limit was increased to \$1.2 million and took effect in August
FSC (Amendment) Bill	To develop the framework for consolidated supervision of non-deposit taking institutions (non-DTIs)	Bill is being finalized for submission to the Legislation Committee of Cabinet, once there is no objection on the Bill by the Attorney General's Chambers

LEGISLATIVE, REGULATORY AND POLICY DEVELOPMENTS cont'd		
Financial Institutions (Special Resolution Framework) Bill	To strengthen the resilience and stability of the financial system in Jamaica. This is to be achieved by creating a framework to address the resolution of non-viable financial institutions while restricting the use of public funds and maintaining vital economic functions	The MOFPS issued additional drafting instructions to the CPC in September and November
Consumer Protection Framework for Deposit Taking Institutions	It seeks to provide protection for consumers who have assets at deposit taking institutions and other institutions regulated by the Bank of Jamaica.	Drafting instructions are being finalized
Regulatory Framework for Virtual Assets and Virtual Asset Service Providers	To create a framework for the management of Virtual Assets and Regulations that will apply to Virtual Asset Service Providers	The MOFPS shared the policy proposal with stakeholders for comments
Financial Services Commission (FSC)		
Efforts to Strengthen the Anti-Money Laundering Framework in 2020	The FSC issued revised guidelines, advisories and provided training for its licensees and registrants to combat anti-money laundering and counter-financing of terrorism and proliferation (AML/CFT/CPF).	Guidelines and Advisories issued
Amendments to ACTS and Regulations		
There was no amendment to the securities, insurance and pension legislations during the 2020 review period. However, Bulletins and Guidelines to effect changes to the operation of the financial sector were made.		
The Securities Sector		
The FSC continued to make strides in enhancing the supervision of the securities sector by monitoring and evaluating the associated risks. The FSC issued the following:		
Proposed Amendments to Securities (Conduct of Business) Regulations	To incorporate new stipulations in the guidelines in a bid to strengthen the standards of market conduct and professional behaviour in the securities sector	Work ongoing
Amendment to the Pool of Allowable Assets for Retail Repurchase Agreements	To clarify the criteria for immobilized corporate bonds in keeping with the FSC's definition of regulated financial institutions	Work ongoing
Guidelines for Exempt Distributions	To outline the requirements that are to be complied with for a distribution of securities to be exempt from registration of its prospectus or offering document with the FSC.	Work ongoing
The Insurance Sector		
The FSC continued to make strides in enhancing the supervision of the insurance sector by monitoring and evaluating the risk associated operating in the sector. The FSC issued the following:		
Valuation of Actuarial Reserves and Other Policy Liabilities of Life Insurers	To outline the standard for the preparation of the valuation and Appointed Actuary's Report.	December
Proposed Legislative Amendments to Strengthen Market Conduct Requirements for Insurance Companies and Intermediaries to Safeguard against Unfair Trade Practices	To legislate standards for acceptable business practices for the protection of policy holders and to give the force of law to market conduct best practices.	Work ongoing
The Pensions Sector		
The FSC continued to make strides in enhancing the supervision of the Pension industry by monitoring and evaluating the risk associated with the industry. The FSC issued the following:		
PR-ADVI-20/09-0006 – Amendment to the Pensions (Superannuation Funds and Retirement Schemes) (Investment) Regulations)	The bulletin outlined the major amendments and explained the new and revised requirements of the Investment Regulations.	September
PR-ADVI-2020/07-0005 INVESTMENT LIMITS – Approvals	The bulletin clarified the prevailing investment limits in the Investment Regulations and outlined the factors that would be considered for pension plans to exceed the limits	July
The Bank of Jamaica (Dealings in Foreign Currency) (Foreign Assets limit) (Pension Funds) Directions	The Bank of Jamaica issued directions which set the limit for pension plans to invest up to 7.5 per cent of its total asset of the pension in foreign assets.	November

PERFORMANCE

The Bank of Jamaica

Total Assets at the BOJ was \$898.1 billion,¹ a real² increase of 22.9 per cent relative to 2019 (Table 9.1). In real terms, Foreign Assets grew by 14.7 per cent to \$580.7 billion while Local Assets increased by 41.4 per cent to \$317.4 billion. In the Foreign Asset category, Time Deposits

& Other Cash Resources grew by 16.4 per cent to \$499.6 billion. In the Local Assets category, Holdings of GOJ Securities increased by 52.8 per cent to \$277.2 billion. Concerning Liabilities, Demand Liabilities increased by 13.9 per cent to \$582.0 billion and Other Liabilities expanded by 40.5 per cent to \$274.3 billion. Total Capital & Reserves increased by 71.1 per cent to \$41.7 billion.

TABLE 9.1
ASSETS AND LIABILITIES OF THE BANK OF JAMAICA AT DECEMBER, 2019–2020
(J\$ '000)

	2019	2020	% Change	Real Change
Foreign Assets	481 159 666	580 696 143	20.7	14.7
Bonds & Other Long Term Securities	42 641 846	49 049 851	15.0	9.4
Time Deposits & Other Cash Resources	408 071 400	499 567 911	22.4	16.4
IMF-Holding of Special Drawing Rights	30 446 420	32 078 381	5.4	0.2
Local Assets	213 447 350	317 404 539	48.7	41.4
Government Obligations:				
Holdings of GOJ Securities	172 466 892	277 229 050	60.7	52.8
Advances and Other GOJ Receivables	-	-		
Advances to Financial Institutions	16 400 000	16 559 386	1.0	-4.0
Other Assets	24 580 458	23 616 103	-3.9	-8.7
TOTAL ASSETS	694 607 016	898 100 682	29.3	22.9
Demand Liabilities	485 841 453	582 031 733	19.8	13.9
Notes & Coins in Circulation	151 717 768	184 242 181	21.4	15.4
Deposits				
Public Sector	125 790 302	70 687 780	-43.8	-46.6
IMF(GOJ)	62 825 776	128 426 765	104.4	94.3
Commercial Banks and Other LFIs	141 758 426	191 225 601	34.9	28.2
Other	3 749 181	7 449 406	98.7	88.9
Other Liabilities	185 567 943	274 329 508	47.8	40.5
International Monetary Fund				
Allocation of Special Drawing Rights	48 025 633	53 836 142	12.1	6.6
Foreign Liabilities	331 558	543 464	63.9	55.8
Open Market Instruments	108 166 164	172 615 601	59.6	51.7
Amounts Due to Government of Jamaica	26 545 703	34 621 326	30.4	24.0
Other Liabilities	2 498 885	12 712 975	408.7	383.6
Total Capital & Reserves	23 197 620	41 739 441	79.9	71.1
TOTAL LIABILITIES, CAPITAL & RESERVES	694 607 016	898 100 682	29.3	22.9

Discrepancies may be due to rounding

Source: Bank of Jamaica

1. Unless otherwise specified, all dollar values are in nominal terms.
2. Unless otherwise stated, all changes are in real terms, discounted by the average Consumer Price Index (CPI) for the respective periods.

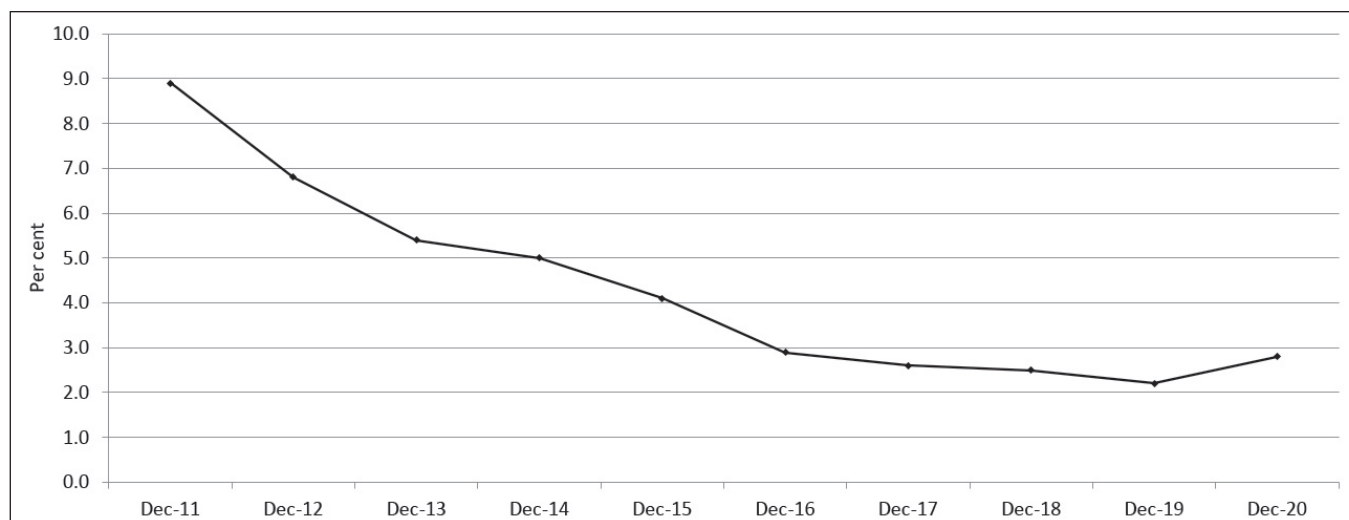


FIGURE 9B: NON-PERFORMING LOANS TO TOTAL LOANS RATIO (SYSTEM TOTAL), 2011-2020

JAMAICA DEPOSIT INSURANCE CORPORATION (JDIC)

The number of Deposit Taking Institutions (DTIs) with Deposit Insurance Scheme (DIS) coverage remained at 11, inclusive of eight commercial banks, two building societies and one merchant bank. The deposit insurance coverage³ was increased by 100 per cent to \$1.2 million per depositor, per insured institution effective August 31, 2020. This increase was due to inflationary impulses and exchange rate movements that eroded the real value of the previous coverage limit since its last increase in 2007. Approximately, 97.3 per cent of insurable deposit accounts are fully insured. With the rise in the threshold, there was a 2.1 percentage point increase in fully insured accounts relative to December 2019. JDIC's public policy objective of fully protecting 90.0 per cent to 95.0 per cent of retail depositors accounts, is in line with international best practices and serves to instill confidence and stability in the financial sector. The Deposit Insurance Fund (DIF) grew by 17.6 per cent to \$27.3 billion relative to the end of 2019.

Deposit Taking Institutions (DTIs)

A total of 11 DTIs were under the supervision of the Central Bank (Table 9.2). The value of Total Assets at these DTIs was \$2 203.8 billion, a real increase of 6.3 per cent relative to the end of 2019. Amongst the key performance metrics, Total Deposits increased by 11.0 per cent to \$1 366.3 billion, the Capital Base increased by 8.5 per cent to \$220.3 billion and Total Loans

increased by 5.4 per cent to \$1 033.1 billion (Table 9.3).

The benchmark for credit quality, Non-Performing Loans (NPL), nominally increased by 41.9 per cent to \$29.3 billion. NPL as a share of total loans was 2.8 per cent, a worsening of 0.6 percentage point relative to 2019 (Figure 9B). The decline in asset quality can be attributed to Commercial Banks as their NPL portfolio increased nominally by 42.9 per cent to \$26.5 billion. Building Societies also increased by 33.5 per cent to \$2.8 billion while FIA institutions had no NPL in their portfolio.

**TABLE 9.2
INSTITUTIONS IN THE JAMAICAN FINANCIAL SYSTEM,
2016–2019**

Institutions	2016	2017	2018	2019	2020
Deposit-Taking Institutions:					
Commercial Banks	6	8	8	8	8
FIA Institutions	2	1	1	1	1
Building Societies	3	2	2	2	2
Credit Unions	34	28	26	25	
Non-Deposit -Taking Institutions:					
Insurance Companies	17	17	17	19	18
Developmental Banks	4	4	4	4	4
Securities Dealers	42	41	31	30	29

Source: Compiled by the Planning Institute of Jamaica

3. JDIC periodically reviews its deposit insurance coverage framework to ensure its continued credibility and adequate protection of depositors. Increases are considered based on various factors, including type of deposit products, composition and size of deposits, developments in the regulatory and policyholders' environment and the wider macroeconomic environment including the impact of inflation and exchange rate.

TABLE 9.3
SELECT KEY INDICATORS OF DEPOSIT-TAKING INSTITUTIONS PERFORMANCE, 2016–2020

	Dec 2016 ^r	Dec 2017 ^r	Dec 2018 ^r	Dec 2019 ^r	Dec-20
Real GDP - Financial Sector (\$million)	83 537	84 777	85 897	89 070	85 729
Percentage Contribution to Real GDP	11.1	11.2	11.1	11.4	12.2
Growth Rate (%)	1.3	1.5	1.3	3.7	-3.8
Average Employment	25 950	27 000	26 275	26 900	25 933
Total Assets (\$million)	1 377 877	1 488 147	1 636 903	1 809 880	2 023 848
Total Deposits (\$million)	877 913	980 960	1 069 344	1 170 218	1 366 356
Total Loans (\$million)	643 157	689 231	795 425	931 958	1 033 094
Capital Base (\$million)	145 226	158 435	177 532	191 099	220 324
Non- Performing Loans[NPLs] (3 months &>) (\$million)	18 407	17 936	19 874	20 672	29 340
NPLs:Total Loans (%)	2.9	2.6	2.5	2.2	2.8
Capital Base:Total Assets(%)	10.5	10.6	10.8	10.7	10.9
NPLs:Capital Base+Provisions (%)	11.0	10.0	9.9	9.5	11.5
Pre Tax Profit Margin (%)	26.7	22.7	31.7	22.4	20.6

r-revised

Discrepancies may be due to rounding

Source: Planning Institute of Jamaica and Bank of Jamaica

Commercial Banks

Total Assets at Commercial Banks were valued at \$1 852.2 billion, an increase of 12.5 per cent in nominal terms and 7.0 per cent in real terms relative to the end of 2019 (Table 9.4). In real terms, the main stimulants of loan growth were increases in Foreign Assets which benefited from foreign exchange gains, up 12.5 per cent to \$376.4 billion; Other Assets, up 11.2 per cent to \$438.1 billion and Loans & Advances, up 4.7 per cent to \$928.5 billion. Loans & Advances outstanding remained the largest contributor to total assets at 50.1 per cent, 1.1 percentage point lower

than the share at the end of 2019. Government Securities was the only asset class to decline by 6.4 per cent to \$109.2 billion.

The value of the stock of Loans & Advances issued to the Goods Producing industry was \$105.4 billion, an increase of 7.7 per cent in nominal terms and 2.4 per cent in real terms compared with the end of 2019 (Table 9.5). In real terms, higher levels of funding were disbursed to Manufacturing by 10.0 per cent to \$37.8 billion; Mining by 9.4 per cent to \$1.1 billion; and Agriculture by 5.8 per cent to \$16.3 billion. Construction & Land Development declined by 3.7

TABLE 9.4
ASSETS OF COMMERCIAL BANKS, DECEMBER 2016–2020
(J\$ '000)

	Dec 2016	Dec 2017	Dec 2018	Dec 2019	Dec 2020	% Change 2020/19	Real Change
(1) Loans & Advances	495 388.5	614 902.7	716 835	842 654	928 501	10.2	4.7
Private Sector	471 193.3	591 265.8	696 702.7	829 341.4	914 428	10.3	4.8
Public Sector	24 195.1	23 636.9	20 132.3	13 312.6	14 073	5.7	0.5
(2) Government Securities	73 940.2	103 205.6	97 584.6	110 992.6	109 240	-1.6	-6.4
Treasury Bills	136.2	3 063.7	4 950.6	8 791.3	8 508	-3.2	-8.0
Other Securities	73 804	100 141.9	92 634	102 201.3	100 732	-1.4	-6.3
(3) Foreign Assets	265 168.8	300 290.4	298 860.4	318 004.2	376 388	18.4	12.5
(4) Other Assets	212 307	332 750.6	375 599.9	374 674.6	438 071	16.9	11.2
TOTAL	1 046 804.5	1 351 149.3	1 488 879.9	1 646 325.4	1 852 201	12.5	7.0

Discrepancies may be due to rounding

Note: Other Assets includes, cash, balance with the Bank of the Jamaica and other Financial Institutions, cheques in the course of collection and fixed assets.

Source: Bank of Jamaica

TABLE 9.5
COMMERCIAL BANKS LOANS AND ADVANCES, 2016–2020
(J\$000)

	Dec. 2016	Dec. 2017	Dec. 2018	Dec. 2019	Dec. 2020	% Change 2020/2019	Real Change 2020/2019
GOODS PRODUCING	52 777 914	59 943 657	82 532 880	97 800 361	105 355 646	7.7	2.4
1. Agriculture	8 950 665	7 978 051	13 951 610	14 666 764	16 317 525	11.3	5.8
(a) Production	8 356 407	6 910 467	9 341 821	7 625 447	8 088 059	6.1	0.8
(b) Marketing	490 207	994 776	1 354 142	1 891 317	3 548 216	87.6	78.3
(c) Land Acquisition	104 051	72 808	3 255 647	5 150 000	4 681 250	-9.1	-13.6
2. Mining	765 232	976 495	3 650 301	932 727	1 073 162	15.1	9.4
3. Manufacturing	17 615 524	22 387 837	30 309 277	32 709 239	37 845 604	15.7	10.0
(a) Sugar, Rum & Molasses	8 403	3 901	131 772	2 054 866	3 327 968	62.0	54.0
(b) Food, Drink & Tobacco	9 098 375	9 252 519	10 680 906	11 634 082	14 311 631	23.0	16.9
(c) Paper, Printing & Publishing	908 447	753 351	938 120	994 760	1 023 732	2.9	-2.2
(d) Textile, Leather and Footwear	276 156	389 770	426 568	604 893	504 229	-16.6	-20.8
(e) Furniture, Fixture and Wood Products	558 810	509 876	478 470	743 035	572 828	-22.9	-26.7
(f) Metal Products	191 344	3 943 761	3 716 860	3 625 236	3 299 677	-9.0	-13.5
(g) Cement & Clay Products	263 780	629 395	4 134 737	1 297 840	1 457 545	12.3	6.8
(h) Chemicals & Chemical Products	1 566 179	1 568 847	1 582 238	1 996 950	1 926 310	-3.5	-8.3
(i) Other	4 744 030	5 336 417	8 219 606	9 757 577	11 421 684	17.1	11.3
4. Construction & Land Development	25 446 493	28 601 274	34 621 692	49 491 631	50 119 355	1.3	-3.7
(a) Construction	21 269 484	24 415 624	31 056 961	44 292 919	45 121 025	1.9	-3.2
(b) Land Development	2 066 904	2 287 806	1 945 156	3 834 791	3 726 808	-2.8	-7.6
(c) Land Acquisition	2 110 105	1 897 844	1 619 575	1 363 921	1 271 522	-6.8	-11.4
SERVICES INDUSTRY	218 261 481	235 493 854	236 656 236	278 063 373	315 657 227	13.5	7.9
5. Financial Institutions	35 389 526	8 101 188	8 076 002	12 309 884	15 109 474	22.7	16.7
6. Transport, Storage & Communication	10 767 390	10 644 289	15 145 493	30 419 739	24 225 542	-20.4	-24.3
7. Electricity, Gas & Water	17 065 369	25 111 266	29 140 719	39 424 662	47 228 338	19.8	13.9
8. Government Services	24 195 125	23 636 921	20 132 326	13 312 555	14 073 068	5.7	0.5
(a) Central Government	3 103 426	2 917 150	1 426 522	1 040 615	1 058 915	1.8	-3.3
(b) Local Government	3	552	10 417	1 488	-	-100.0	-100.0
(c) Selected Public Entities	20 895 337	20 490 500	18 056 043	12 086 925	12 967 035	7.3	2.0
(d) Other Public Entities	196 359	228 719	639 344	183 527	47 118	-74.3	-75.6
9. Distribution	53 327 415	59 804 879	66 543 765	75 857 573	81 394 803	7.3	2.0
10. Food and Beverage Services (excluding Tourism)			20 967	999 295	1 584 121	58.5	50.7
11. Tourism	44 203 884	52 634 975	52 236 061	48 473 828	65 306 893	34.7	28.1
12. Entertainment	2 241 956	4 380 459	2 490 893	2 238 764	2 494 169	11.4	5.9
13. Professional & Other Services	31 070 816	51 179 877	42 870 010	55 027 073	64 240 819	16.7	11.0
CONSUMPTION	224 349 058	320 169 306	397 645 882	466 790 231	507 488 433	8.7	3.4
14. Personal (Local Residents)	210 609 218	294 787 288	347 316 114	410 481 495	444 060 233	8.2	2.8
15. Overseas Residents	13 739 840	25 382 018	50 329 768	56 308 736	63 428 200	12.6	7.1
TOTAL	495 388 453	615 606 817	716 834 998	842 653 965	928 501 306	10.2	4.7

r–revised

p–preliminary

Discrepancies may be due to rounding

Source: Bank of Jamaica

per cent to \$50.1 billion. These industries all experienced declines in RVA for the calendar year. Loan disbursements to Agriculture were to shore up against the loses from the tourism sector. In regards to Manufacturing and Mining & Quarrying firms used the funds for retooling and other maintenance operations. Fewer housing starts and reduced activities from nonresidential projects dampened funding requirements.

The stock of Loans & Advances to the Services Industry relative to the end of 2019 increased by 13.5 per cent in nominal terms and 7.9 per cent in real terms to \$315.7 billion. In real terms, all industries recorded increases with the exception of Transport, Storage and Communication, which was impacted by the restriction in movement associated of the COVID-19 pandemic. The categories that contributed the most to the increase were, Food & Beverage Services, by 50.7 per cent to \$1.6 billion; Tourism, by 28.1 per cent to \$65.3 billion; Professional & Other Services, by 11.0 per cent to \$64.2 billion; Financial Institution, by 16.7 per cent to \$15.1 billion; and Electricity, Gas & Water, by 13.9 per cent to \$47.2 billion (see Table 9.5). Lending for productive purposes⁴ to the real economy accounted for 45.3 per cent of the total stock of loans and advances, an increase of 0.7 percentage point relative to 2019.

Consumer Loans valued at \$507.5 billion grew by 8.7 per cent in nominal terms and 3.4 per cent in real terms compared with the end of 2019. Lending to Local Residents grew by 2.8 per cent to \$444.1 billion in real terms while loans to Overseas residents increased by 7.1 per cent to \$63.4 billion in real terms. The share of the stock of Loans & Advances for personal consumption declined by 0.7 percentage point to 54.7 per cent.

Financial Institutions Act (FIA) – Licensees

Total Assets at FIA institutions were valued at \$6.1 billion, an increase of 22.0 per cent in nominal terms and 15.9 per cent in real terms relative to the end of 2019 (Table 9.7). In real terms, all four asset types recorded increases. The largest percentage increases were in Foreign Assets by approximately \$0.65 billion to \$0.7 billion and Government Securities by approximately \$0.02 billion to \$0.1 billion. Loans & Advances declined by 1.9 percentage points and accounted for 27.9 per cent of total assets.

The stock of Loans & Advances for Goods Producing industries was \$0.4 billion, representing an increase in real terms of 22.2 per cent relative to the end of 2019 (Table 9.7). The drivers of this out-turn can be attributed to higher levels of disbursements to Agriculture by \$0.1 billion and a \$0.1 billion dollar increase to Construction & Land Development. This was counterbalanced by declines of 37.8 per cent and 17.3 per cent in Manufacturing and Mining, respectively.

The stock of Loans & Advances disbursed to the Services industry declined by 42.5 per cent to \$0.6 billion in real terms relative to the end of 2019. This reduction was related to the 85.0 per cent decline in disbursements to Professional & Other Services (see Table 9.7). The share of Loans to the real sector accounted for 61.7 per cent of total loans, a decline of 20.9 percentage points compared with the end of 2019.

Loans & Advances for consumption purposes at \$0.6 billion, represented a real increase of 113.9 per cent compared with the end of 2019.

TABLE 9.6
ASSETS OF INSTITUTIONS LICENSED UNDER THE FINANCIAL INSTITUTIONS ACT, DECEMBER 2016–2020

	Dec 2016	Dec 2017	Dec 2018	Dec 2019	Dec 2020	% Change 2020/19	Real Change
(1) Loans & Advances	18 112.6	1 014.7	1 070.0	1 597.1	1 712.6	7.2	1.9
(2) Government Securities	1 014.8	58.9	59.5	61.1	82.9	35.7	29.0
(3) Foreign Assets	9 075.4	67.5	72.2	73.6	742.9	909.4	859.6
(4) Other Assets	9 524.6	887.9	1 370.0	3 294.8	3 591.7	9.0	3.6
Total	37 727.4	2 029.0	2 571.7	5 026.6	6 130.2	22.0	15.9

Discrepancies may be due to rounding

Note: Other Assets includes, cash, balance with the Bank of the Jamaica and other Financial Institutions, cheques in the course of collection and fixed assets.

Source: Compiled by the PIOJ from data supplied by the BOJ

4. The sum of loans to all industries except for government and personal consumption

TABLE 9.7
LOANS & ADVANCES OUTSTANDING TO LICENSEES UNDER THE FINANCIAL INSTITUTIONS ACT,
DECEMBER, 2016–2020 (\$MILLION)

	Dec 2016	Dec 2017	Dec 2018 ^f	Dec 2019	Dec 2020	% Change	Real % Change
Goods Producing	2 426.2	433.7	456.8	309.8	398.4	28.6	22.2
Agriculture	153.3	70.1	45.8	32.8	108.9	231.6	215.2
Mining, Quarrying & Processing	171.5	0.0	91.0	81.0	70.5	-13.0	-17.3
Manufacturing	926.7	363.6	320.0	196.0	128.3	-34.5	-37.8
Construction & Land Development	1 174.7	0.0	0.0	0.0	90.6	-	-
Services	7 996.6	652.3	458.9	1 009.0	610.4	-39.5	-42.5
Transport, Storage & Communication	518.9	0.0	0.0	0.0	64.5	-	-
Financial Institution	9.4	4.2	0.0	13.2	0.0	-	-
Electricity, Gas & Water	2 703.4	87.5	138.1	197.3	52.1	294.0	274.6
Government Services	1 308.8	0.0	0.0	0.0	0.0	-	-
Distribution	39.5	0.0	0.0	0.0	225.8	14.5	8.8
Entertainment	1 754.1	0.0	0.0	0.0	142.3	-	-
Tourism	0.0	0.0	0.0	0.0	0.0	-	-
Professional & Other Services	1 662.4	560.6	320.8	798.5	125.7	-84.3	-85.0
Consumption	7 689.9	99.4	154.3	278.2	626.0	125.0	113.9
Personal	7 689.9	99.4	154.3	278.2	626.0	125.0	113.9
TOTAL	18 112.7	1 185.4	1 070.0	1 597.1	1 634.8	2.4	-2.7

r–revised

p–preliminary

Discrepancies may be due to rounding

Source: Bank of Jamaica

Building Societies

Total Assets held at Building Societies were valued at \$166.7 billion, an increase of 5.1 per cent in nominal terms and a decrease of 0.1 per cent in real terms (Table 9.8). In real terms, there were declines of 42.5 per cent, 12.5 per cent and 4.1 per cent in the categories Government Securities, Other Assets and Foreign Assets, respectively. These declines were counterbalanced by a real increase of 11.5 per cent in Loans & Advances. Loans & Advances as a proportion of total assets increased by 6.4 percentage points to 61.7 per cent relative to the end of 2019.

Interest Rates

The Central Bank maintained its benchmark Overnight Policy Rate⁵ at 0.5 per cent relative to the end of 2019. The ongoing accommodative monetary policy stance is intended to support economic recovery in keeping with its mandate of price stability to be achieved through low, stable

and predictable inflation. This is evidenced by inflation remaining within the target range of 4.0 per cent – 6.0 per cent in the medium term (see chapter on Money and Inflation).

The Commercial Banks domestic currency weighted average monthly loan rates of 12.06 was 94 basis points lower relative to 2019 (Table 9.9). The reduction was driven by a 90 basis points decline to 9.63 per cent for Commercial Credit; a 76 basis point decline to 20.97 for Personal Credit; and a 50 basis point decline to 7.86 per cent for Local Government & Other Public Entities. Loans to the Central Government increased by 45 basis points to 10.19 per cent. The Central Bank reduced the cash reserve requirements of DTIs for local and foreign currency which facilitated downward pressure on interest rates.

The Commercial Banks monthly weighted average deposit rate⁶ was 1.06 per cent, 12 basis points lower relative to the corresponding period in 2019 (Table 9.10). For the

5. Effective March 1, 2019, the overnight deposit for deposit-taking institutions was no longer available. Interest is paid on overnight balances in the current accounts of deposit-taking institutions at the Bank of Jamaica. The applicable interest rate is the Bank of Jamaica policy rate

TABLE 9.8
ASSETS OF BUILDING SOCIETIES, 2016–2020

	Dec 2016	Dec 2017	Dec 2018	Dec 2019	Dec-20	% Change 2019/18	Real Change
(1) Loans & Advances	129 659.8	73 284.2	77 522.4	87 707.2	102 880.4	17.3	11.5
(2) Government Securities	25 666.5	12 479.9	13 014.2	9 846.0	5 951.3	-39.6	-42.5
(3) Foreign Assets	66 202.3	20 115.4	25 312.7	19 357.2	19 519.4	0.8	-4.1
(4) Other Assets	58 754.8	29 918.2	30 487.7	41 658.1	38 329.5	-8.0	-12.5
Total	280 283.4	135 797.7	146 337.2	158 568.5	166 680.6	5.1	-0.1

Discrepancies may be due to rounding

Note: Other Assets includes, cash, balance with the Bank of the Jamaica and other Financial Institutions, cheques in the course of collection and fixed assets.

Source: Compiled by the PIOJ from data supplied by the BOJ

period, declines were recorded for Demand deposits rates, by 11 basis points to 0.74 per cent; Savings, by 9 basis points to 0.51 per cent; and Time deposits, by 9 basis points to 2.46 per cent. The interest rate spread narrowed by 55 basis points to close the year at 10.74 per cent. The narrower spread indicated lower transaction cost and reduced cost of borrowing for creditors.

6.7 per cent relative to the end of 2019 (Table 9.11). Liabilities also grew by 4.8 per cent to \$247.2 billion. Increases were registered for Net Investment Income, by 31.9 per cent to \$7.3 billion; Net Premium Income, by 3.4 per cent to \$17.9 billion; and Net Income, by 7.3 per cent to \$6.7 billion. A new market entrant brought about increased levels of competition and growth to key performance metrics in the sector.

NON-DEPOSIT-TAKING INSTITUTIONS

Life Insurance Companies

Total Assets were valued at \$367.3 billion, an increase of

General Insurance Companies

The value of Total Assets at General Insurance companies increased by 9.4 per cent to \$93.4 billion (Table 9.12). Liabilities, increased by 11.2 per cent to \$66.0 billion. Net

TABLE 9.9
COMMERCIAL BANKS' WEIGHTED AVERAGE MONTHLY LOAN RATES, 2018–2019
(PER CENT)

End of Period	Instalment credit		Mortgage credit		Personal Credit		Commercial Credit		Local Govt & Other Public Entities		Central Govt.		Overall	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
January	11.36	10.97	8.25	7.70	22.02	21.08	10.64	9.98	7.85	8.37	10.69	9.27	13.32	12.37
February	11.31	10.93	8.23	7.67	21.85	20.99	10.73	9.90	7.80	8.37	9.53	10.10	13.30	12.31
March	11.26	10.90	8.20	7.64	22.18	21.29	10.68	9.88	8.69	8.47	9.83	9.76	13.30	12.35
April	11.23	10.85	8.14	7.59	21.83	21.03	10.96	9.77	8.55	8.53	10.16	10.23	13.25	12.17
May	11.23	10.82	8.02	7.56	22.45	20.95	10.51	9.72	8.70	8.66	10.77	10.85	13.35	12.12
June	11.22	10.77	7.92	7.53	21.83	20.91	10.60	9.68	10.10	8.55	16.46	10.85	13.09	12.05
July	11.21	10.76	7.88	7.47	21.79	20.96	10.52	9.52	8.01	7.07	11.02	10.99	13.00	12.00
August	11.20	10.73	7.85	7.42	21.73	20.93	10.52	9.52	8.02	7.11	11.05	11.28	12.94	11.95
September	11.05	10.71	7.82	7.38	21.52	20.86	10.88	9.48	8.07	7.09	10.52	10.84	12.90	11.91
October	11.12	10.67	7.78	7.35	21.35	20.92	10.32	9.38	8.09	7.22	9.52	8.78	12.64	11.84
November	11.03	10.65	7.75	7.34	20.90	20.87	10.16	9.39	8.15	7.34	9.23	9.83	12.42	11.84
December	10.99	10.61	7.72	7.31	21.37	20.88	9.93	9.38	8.24	7.53	8.97	9.52	12.47	11.80
Average	11.19	10.78	7.96	7.50	21.74	20.97	10.54	9.63	8.36	7.86	10.65	10.19	13.00	12.06

Discrepancies may be due to rounding

Source: Bank of Jamaica

TABLE 9.10
COMMERCIAL BANKS
MONTHLY WEIGHTED AVERAGE DEPOSIT INTEREST RATES, 2019–2020

End of Period	Demand		Savings		Time		Overall A/W Rate	
	2019	2020	2019	2020	2019	2020	2019	2020
January	0.88	0.70	0.64	0.56	2.70	2.37	1.28	1.07
February	0.86	0.70	0.67	0.55	2.74	2.43	1.30	1.07
March	0.93	0.78	0.63	0.54	2.66	2.41	1.23	1.07
April	0.94	0.77	0.65	0.53	2.67	2.38	1.25	1.04
May	1.02	0.72	0.64	0.53	2.56	2.41	1.26	1.05
June	0.98	0.76	0.62	0.53	2.51	2.46	1.18	1.06
July	0.94	0.80	0.63	0.51	2.47	2.40	1.16	1.05
August	0.73	0.75	0.52	0.50	2.50	2.40	1.10	1.04
September	0.73	0.71	0.55	0.47	2.53	2.46	1.10	1.03
October	0.72	0.70	0.55	0.47	2.39	2.62	1.08	1.08
November	0.72	0.75	0.54	0.47	2.46	2.57	1.10	1.10
December	0.72	0.75	0.55	0.48	2.44	2.59	1.10	1.09
Average	0.85	0.74	0.60	0.51	2.55	2.46	1.18	1.06

Discrepancies may be due to rounding

Source Bank of Jamaica

Premium income experienced a 3.4 per cent increase to \$5.6 billion. Net Investment Income declined by 35.1 per cent to \$0.7 billion and Net Income decreased by 6.2 per cent to \$1.1 billion.

Funds Under Management (FUM)

Total FUM was valued at \$1 808.4 billion, a decline of 0.8 per cent relative to the end of 2019. Total Assets decreased by 4.5 per cent to \$1 087.5 billion, while their Capital Base

increased by 12.6 per cent to \$253.4 billion and Net Income grew by 15.3 per cent to \$12.8 billion. An analysis by groupings revealed that Securities Firms FUM declined by 0.2 per cent and was valued at \$1 291.8 billion. Accounting for 71.5 per cent of the industry. Insurance companies, which managed 21.5 per cent of all FUM, decreased their holdings by 5.8 per cent to \$387.8 billion. FUM in the category, Other recorded a decline by 16.2 per cent to \$53.6 billion. Unit Trust Management Companies was the only group to record

TABLE 9.11
PERFORMANCE INDICATORS FOR
THE LIFE INSURANCE INDUSTRY, 2016–2019
(\$ MILLION)

Year	Assets	Liabilities	Net Premium Income	Net Income	Net Investment Income
2016	297 135.8	228 323.1	12 387.3	5 154.7	7 401.4
2017	311 140.2	229 169.0	19 876.0	4 475.9	6 318.7
2018	323 117.2	231 285.6	15 462.5	6 079.8	8 399.4
2019	344 180.9	235 902.4	17 352.8	6 267.2	5 526.8
2020	367 323.1	247 171.3	17 949.7	6 725.8	7 292.0

Source: Financial Services Commission

TABLE 9.12
PERFORMANCE INDICATORS FOR
THE GENERAL INSURANCE INDUSTRY, 2016–2019
(\$ MILLION)

Year	Assets	Liabilities	Net Premium Income	Net Income	Net Investment Income
2016	70 684.6	44 586.3	4 349.5	729.2	826.70
2017	78 306.9	51 246.5	4 785.5	924.7	1 338.9
2018	81 363.4	54 056.9	5 234.9	768.0	771.9
2019	85 365.8	59 351.3	5 386.3	1 139.4	1 024.6
2020	93 432.2	66 006.8	5 568.3	1 069.1	664.6

Source: Financial Services Commission

an increase in FUM by 42.0 per cent to \$74.2 billion.

The Jamaica Stock Exchange (JSE)

The JSE Index declined by 22.4 per cent relative to the end of 2019 to close the year at 395 614.91 points. The performance was largely influenced by the COVID-19 pandemic as investors lost confidence in the earning potential of firms in the medium term and shifted capital to safer asset classes. Overall market capitalization, which is a measure of a company's worth, declined by 19.8 per cent to \$1 547.1 billion. Market Capitalization in the JSE Financial and Manufacturing and Distribution index was impacted as dividends were suspended for a long period of the calendar year. A total of 11 stocks advanced, 32 declined and 1 remained unchanged which resulted in an average stock price depreciation of 3.1 per cent relative to December 2019. With investor sentiment on the wane, three Initial Public Offerings were executed in comparison to seven in the prior year. Movement in the key indicators were as follows:

- number of transactions increased by 48 484 transactions to 172 046 transactions⁷
- volume of transactions decreased by 2.0 billion shares to 6.7 billion shares⁸
- value of transactions decreased by 45.6 per cent to \$49.9 billion.⁹

Junior Stock Exchange Market

The Junior Stock Exchange Market index closed at 2 643.38 points, declining by 21.1 per cent relative to December 2019. Market Capitalization declined by 20.9 per cent to \$119.7 billion. Consequently, a total of 5 securities advanced and 34 declined leading to the average stock price depreciating by 22.8 per cent. A total of two new companies were listed on the junior market in comparison to five in the prior year. The movements in the key indicators were as follows:

- number of transactions, up 20 373 transactions to 68 128
- volume of transactions, down 1.1 billion shares to 1.8 billion shares
- value of transactions, down 50.1 per cent to \$4.7 billion.

The combined market capitalization of the main market and junior market declined to \$1.7 trillion as at December 31.

Employment

The annual average employment¹⁰ in the Finance & Insurance Services Industry was 25 933 persons, a decrease of 1 467 persons relative to 2019 (see Table 9.3). The decline in employment in the sector can be attributed to the closure of some retail transactional services and an uptick in the usage of online banking facilities in response to measures to limit the spread of COVID-19. As a share of total average employment, the industry remained at 2.2 per cent. There were 633 fewer females and 833 fewer males employed in the industry. As a share of total average employment, females accounted for 68.0 per cent while males accounted for 32.0 per cent.

OUTLOOK

The Finance and Insurance Services industry is expected to rebound in 2021. This is predicated on economic recovery, improved labour market conditions and increased business and consumer confidence. Lending Institutions are expected to generate higher levels of fee and commission income emanating from increased take up of financial services by retail and institutional investors. Life and General Insurance companies are expected to be profitable due to higher Net Premiums and Net Investment Incomes. The amount of total FUM is expected to increase and should impact the profitability of management firms. The transition of the Bank of Jamaica to an independent institution should auger well for business and investors as there will be increased levels of transparency, accountability and a clear focus on price stability which is needed for long-term investment decisions. ■

7. The number of transactions that took place in a given period.

8. The number of shares that were traded in a given period.

9. The dollar value of all shares traded in a given period.

10. Average Employment represents data for January, July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for July and October.

SECTORAL PERFORMANCE

Agriculture

Mining and Quarrying

Manufacturing

Micro and Small Enterprises

Construction

Energy, Electricity and Water

Transport, Storage and Communication

Hotels and Restaurants

Entertainment and Sport

Wholesale & Retail Trade, Repairs and
Installation of Machinery

AGRICULTURE

INTRODUCTION



A decline of 1.4 per cent in Real Value Added (RVA) was recorded for the Agriculture, Forestry & Fishing industry compared with 2019. The industry’s contribution to Total RVA was 7.8 per cent. As indicated in the

Planning Institute of Jamaica’s (PIOJ) Agriculture Production Index (API), the reduction in RVA stemmed from downturns mainly in Traditional Export Crops, Animal Farming and Fishing while there was an increase for Other Agricultural Crops. The year’s performance reflected the combined negative effect of the negative impact of the Coronavirus Disease 2019

(COVID-19) pandemic on the economy and adverse weather conditions.

Data supplied by the Climate Branch of the Meteorological Service showed accumulated rainfall of 1 733 mm, 97.7 per cent of the 30-year mean. The accumulated rainfall was 1 387 mm, 78.2 per cent of the 30-year mean, for 2019.

Work continued under the government’s Production Incentive Programme (PIP), aimed to increase production of strategically selected crops and livestock for local consumption with export potential. However, due to the impact of COVID-19 and Tropical Storms Zeta and Eta (October and November), the programme was reorganized and divided into three components to facilitate the speedy recovery of the agricultural sector.

Earnings from exports of traditional agricultural commodities (coffee, banana, citrus, cocoa and pimento) were US\$18.5 million compared with US\$16.1 million. Reduction in earnings were recorded for three of the five traditional crops – Citrus (Fresh Fruits) by 53.1 per cent

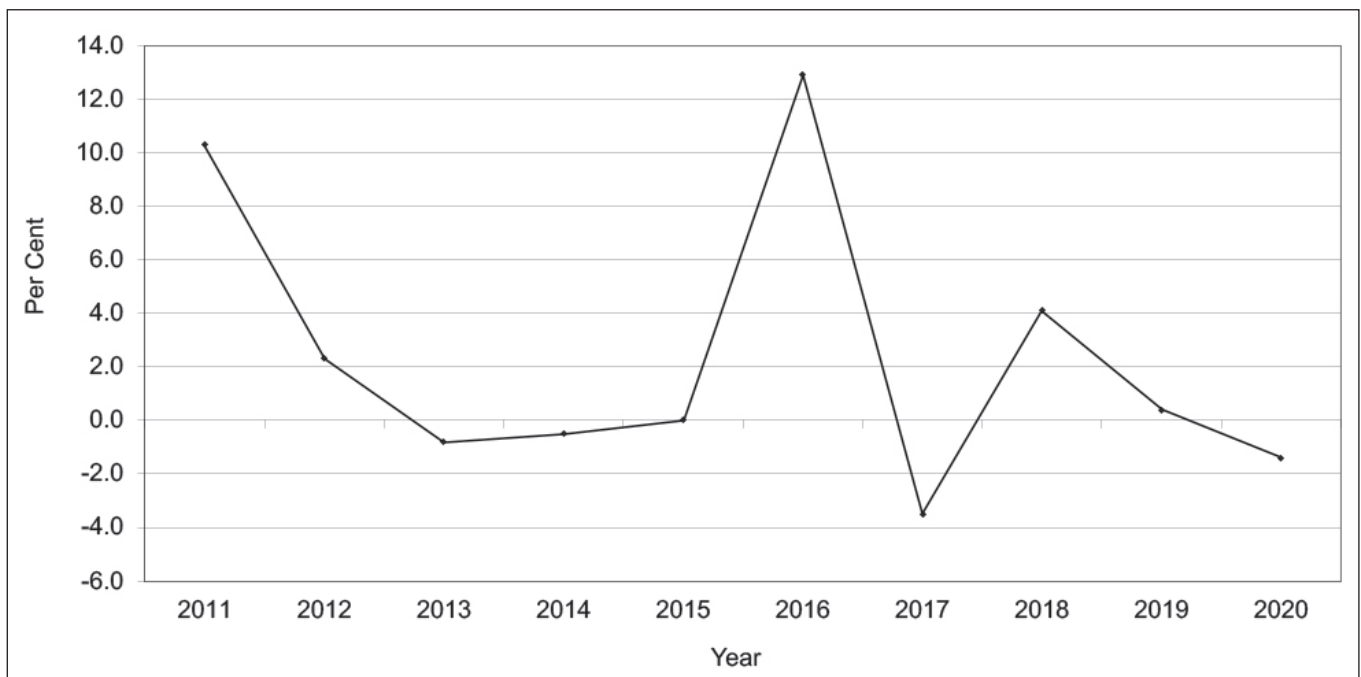


FIGURE 10A : REAL VALUE ADDED GROWTH RATE FOR AGRICULTURE, FORESTRY & FISHING, 2011–2020

TABLE 10.1
AGRICULTURE PRODUCTION INDEX 2010–2020
BASE YEAR = 2007

YEAR	SUB-INDUSTRIES					TOTAL
	TRADITIONAL EXPORT CROPS	OTHER AGRICULTURAL CROPS	ANIMAL FARMING	FISHING	POST HARVEST ACTIVITIES	
2010	98.2	113.8	99.0	101.1	70.2	106.6
2011	99.2	134.4	98.1	98.0	60.1	117.6
2012	100.9	139.1	102.9	71.4	68.3	119.8
2013	82.9	141.2	101.8	96.8	65.4	119.1
2014	107.2	130.4	105.2	76.6	49.0	116.2
2015	107.3	128.7	108.1	87.5	53.2	116.6
2016	108.8	149.6	122.3	89.1	73.5	131.4
2017	115.0	140.9	122.1	102.4	61.4	128.2
2018 ^r	115.6	151.0	125.2	78.9	40.7	132.4
2019 ^r	108.0	153.7	125.5	86.1	57.3	133.4
2020 ^p	100.7	154.7	119.9	85.7	41.5	131.4
% Change 2020/2019	-6.8	0.7	-4.5	-0.5	-27.7	-1.5

r – revised

p – preliminary

Discrepancies in table due to rounding

Source: Planning Institute of Jamaica

TABLE 10.2
VALUE OF TRADITIONAL EXPORTS, 2016 - 2020
(US\$' 000)

	2016	2017	2018	2019	2020 ^p	2019/2018	% Change 2020/2019
Traditional Export Crops							
Bananas	358	474	637	578	726	-9.3	25.6
Citrus (Fresh Fruit)	1 806	1 175	953	816	383	-14.4	-53.1
Coffee	27 586	19 402	14 760	11 940	15 850	-19.1	32.7
Cocoa	895	430	449	454	348	1.1	-23.3
Pimento	2 508	2 099	1 899	2 280	1 239	20.1	-45.7
TOTAL	33 152	23 580	18 697	16 068	18 546	-14.1	15.4

p – preliminary

Source: Statistical Institute of Jamaica

to US\$383 000, Cocoa by 23.3 per cent to US\$348 000 and Pimento by 45.7 per cent to US\$1.2 million. Earnings from the export of Banana and Coffee grew by 25.6 per cent and 32.7 per cent to US\$726 000 and US\$15.9 million, respectively. The latter accounted for 85.5 per cent of total export earnings by the industry compared with 74.3 per cent of earnings in 2019.

POLICIES AND PROGRAMMES

The policies and programmes undertaken by the Ministry of Agriculture & Fisheries (MOAF)¹ was guided by the overarching policy framework of *Vision 2030 Jamaica – National Development Plan* and the strategies and actions outlined in the *Medium Term Socio-Economic Policy Framework (MTF), 2018–2021*. Accordingly, the

1. Subsequent to the 2020 General Elections, the then Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF) into two separate entities, the Ministry of Agriculture and Fisheries (MOAF), and the Ministry of Industry, Investment and Commerce (MIIC). Notwithstanding this, the Ministries acted in unison towards the achievement of their mandates.

Ministry, driven by its sustainable economic growth and job creation objective continued the implementation of priority medium term strategies intended to:

- optimize the production and productivity of key local produce and products towards targeted markets with special focus on youth in agriculture
- increase access of select local industries to emerging and existing markets within a framework of beneficial inclusion of youth, women and micro-enterprises
- build climate-resilient agriculture, fisheries, manufacturing and services sectors
- strengthen Agricultural Health and Food Safety Systems
- strengthen the capacity of the Ministry and entities to efficiently and effectively implement policies, programmes and projects.

Among the programmes and projects pursued were the:

PIP

To facilitate the speedy recovery of the industry, given the impact of the pandemic and its associated measures on agriculture and fishing, the PIP was reconfigured and divided accordingly:

- *Component 1:* designed to continue the focus on the priority crops² and livestock with the inclusion of lime, coco, assorted fruits and vegetables, small ruminants and backyard garden kits
- *Component 2:* designed to provide additional support, with primary focus on tractor operations, bulldozer/backhoe, drone technology, greenhouse, water catchment, purchasing of excess produce and irrigation kits
- *Component 3:* embodied the National Recovery Programme and addressed issues that were critical to sustaining the growth and development of the agricultural sector, preserve the country's food and livelihood security and seek to mitigate the impact of Tropical Storms Zeta and Eta.

The industry, supported by favourable weather conditions (from the last quarter of 2019 into the first quarter of the year) recorded increased agricultural output during January–March 2020. However, with the onset of the pandemic in early March and the consequent downturn in the tourism sector, as well as reduced access to local and export markets, farmers had excess produce. This was valued at \$14.0 billion, spread across the subsector's crops (vegetables, condiments, fruits, roots and tubers), livestock (poultry, pork and other meats), Fishery (lobster, conch, fin fish and aquaculture) Eggs and Dairy. The Fisheries sub-industry, influenced by the closure or scaling down of the

operations of many hotels and food establishments, was also impacted by the need to practice social distancing. As a result, many consumers curtailed visits to fishing beaches and other food fish distribution centres. Most operations became uncertain as farmers were unsure of the way forward, consequent on the fallout in the industry.

In response, funding support of \$40.0 billion was sought by the Ministry to pursue strategies to protect the country's agriculture and food and nutrition security, whilst building resilience. The strategies included:



- establishment of an Excess Supply and Distribution Management Fund (\$14.0 billion)
- establishment of a Soft Loan Programme for Agro processors and Farmers (\$7.0 billion)
- increased Incentives Programme (\$9.0 billion)
- agricultural Stimulus Programme (Post COVID-19) {\$10.0 billion}.

The following priority initiatives were pursued:

- a Buy-Back Programme, in which \$275.0 million was geared towards securing the services of purveyors to assist with the purchase and redistribution of produce from farmers, thereby assisting more than 30 000 farmers directly and indirectly
- provision of approximately \$25.0 million in subsidies and incentives for select livestock farmers
- support of \$90.6 million to sugar cane, cocoa and coffee farmers
- support of approximately \$226.0 million for the Fisheries Resilience
- support totalling \$175.0 million provided to the Disaster Risk and Mitigation Programme
- a special Production Incentive Programme expended \$140.0 million
- provision of support in excess of \$418.0 million for equipment and infrastructure development
- provision of approximately \$8.0 million to the egg industry
- support for the pork industry – the Ministry provided \$4.0 million to assist the industry with slaughtering and storage of carcasses and farmers' re-registration.

Agricultural Competitiveness Programme Bridging Project (ACBPB)

Under Component 1 which proposed the development of the Spring Garden Agro-Park, activities included the

2. The original nine crops are yams, cassava, ginger, strawberry, hot pepper, dasheen, MD2 pineapple, onion and Irish potato.

evaluation of Tenders for the construction of the farm access ways and the re-advertisement for Tenders for Phase 1 of the river training. There was a total yield of 154 640.4 kilogrammes of produce from the 206.5 hectares lands under production in the park. Additional infrastructural works resulted in the clearing of 55.7 hectares of land, the upgrading of 4.0 kilometres (km) of farm roads and 11.9 km of drains and verges. For the year, the park had 25 investors who employed 36 persons. The ACPBP is to facilitate the placement of Jamaica in a competitive position to provide solutions to the structural challenges that are confronted by the local agriculture sector, whilst at the same time providing an opportunity to establish and fully exploit the market potential which exists for Jamaican fresh produce, nationally and internationally. These are to be achieved through both the Spring Garden Agro-Park Development and the Community-Based Climate Resilience Fisheries projects. The latter seeks to enhance resilience to climate change among targeted fishing and aquaculture communities, by assisting the development of fisheries policies and institutional capacity building among fisherfolks. Activities related to the project, which is still in its early stages of implementation, include the engagement of consultants to conduct:

- an Analysis of Climate Change Knowledge Attitude and Practices in the Fisheries Sector
- a Social Assessment on Climate Change Impacts on Gender Youth and Labour Dynamics
- an upgrade of the existing Hatchery contract.

Essex Valley Agricultural Development Project (EVADP):

This Project aims to transform the irrigation infrastructure to better withstand the effects of climate change (more frequent and longer periods of drought and more unpredictable rainfall patterns), which severely reduces the dependability of rainfall as the primary source of water for agriculture. The project which is essential to the sustainable growth of agriculture in Jamaica, will positively impact the livelihoods of more than 700 farmers on 718 hectares of land through the provision of irrigation water and improved access to local and global agricultural markets. The related activities were:

- drilling of two wells, one was abandoned due to technical challenges and the second well is at Epsom Downs
- receipt of tender documents from consultants on the designs for the water distribution network
- commencement of tender procurements for consultancy on the irrigation systems and farm roads
- delivery of a backhoe to the National Irrigation Commission

- completion of Pilot Test of Tariff Model for Tariff Study.

The *Rural Agricultural Development Authority (RADA)* continued its drive to promote the development of agriculture. In the area of farmer training, RADA engaged a total of 7 449 farmers in 2 196 interactive training sessions to include food safety, good agricultural practices, marketing, technology and livestock development. With regard to the Farm Road Rehabilitation Programme, 56 roads were rehabilitated at a cost of \$375.0 million. A total of one hundred roads were projected to be rehabilitated for the 2020/21 period with a budget of \$525.0 million.

Work continued on amending the *Agro-Investment Corporation Act (2010)*, *Plant Quarantine Act (2005)*, and *Animal (Disease and Importation) Act (2004)*. Drafting instructions in relation to these amendments were issued.

PERFORMANCE

RVA for the Agriculture, Forestry and Fishing industry declined by 1.4 per cent, due to the impact of the COVID-19 pandemic and adverse weather conditions. These led to mixed quarterly performances—expansions in January–March (7.8 per cent) and July–September (2.0 per cent); contractions in April–June (8.5 per cent) and October–December (6.1 per cent)—which, combined contributed to the years out-turn. The PIOJ's API showed reductions in gross output of Traditional Export Crops, Animal Farming, Fishing and Post-Harvest Activities, which outweighed an increase in Other Agricultural Crops (see Table 10.1).

TRADITIONAL EXPORT CROPS

The contraction in the Traditional Export Crops sub-index resulted from reductions in the production of sugarcane, banana and cocoa, as coffee production increased. Earnings from Traditional



Export Crops was \$18.5 million compared with US\$16.1 million in 2019. Three of the five traditional export crops recorded reduced earnings (see Table 10.2).

Sugar Cane

Total Sugar Cane milled for the 2019/2020 crop year (November 2019–October 2020), from which 43.9 thousand tonnes of sugar was produced. This compared with 744.2 thousand tonnes milled and a yield of 56.5 thousand tonnes sugar during the 2018/2019 crop year (Table 10.3).

TABLE 10.3
PRODUCTION STATISTICS: SUGAR CANE AND DERIVATIVES, 2016–2020

PARTICULARS	UNIT OF MEASURE	2016	2017	2018	2019	2020
Cane Milled (Crop Year)						
Total	'000 tonnes	1 127.1	1 131.2	1 028.4	744.2	519.1
Farmers		618.7	647.0	478.3	307.0	208.3
Estates		508.4	484.2	550.1	437.2	310.8
Sugar Production (Commercial)						
Calendar Year	'000 tonnes	79.3	81.1	76.7	56.5	41.7
Crop Year	'000 tonnes	79.3	84.3	78.8	56.5	43.9
Acreages Reaped (Industry)						
	'000 hectares	20.4	19.5	18.6	15.7	11.4
Farmers		10.8	11.1	10.0	7.4	5.0
Estates		9.6	8.4	8.5	8.4	6.4
Tonnes Cane Per Hectare						
Industry		54.9	58.0	55.3	47.4	45.5
Farmers		51.2	58.3	47.8	41.5	41.7
Estates		59.0	57.6	64.7	52.0	48.6
Tonnes Cane Per Tonne Commercial Sugar						
		14.21	13.42	12.98	13.18	12.42
Tonnes Cane Per Tonne 96⁰ Sugar						
		13.60	12.86	12.40	12.59	11.82
Tonnes Sugar Per Hectare						
		3.86	4.16	4.24	3.60	3.85
Molasses						
Production	'000 tonnes	51 995	53 827	44 289	34 586	24 410
Export	'000 litres	0.0	0.0	0.0	0.0	0.0
Value	US\$'000	0.0	0.0	0.0	0.0	0.0

Source: Sugar Industry Authority

Contributing to the lower output were the:

- closure of the Golden Grove sugar factory and logistic challenges faced by farmers in transporting cane to other factories
- reduction in output of sugar cane milled by Frome and Worthy Park sugar factories
- reduction in private cane suppliers due to the closure of sugar factories.

There was an improvement in the rate of sugar recovery per tonne of cane processed as indicated by the improvement in tc:ts³ ratio (tonnes cane per tonne sugar), which was 11.82 tonnes compared with 12.59 tonnes in the previous crop year. In addition, the Tonnes Sugar Per Hectare indicator improved to 3.85 from 3.60 in the previous crop year.

The volume of sugar exported declined from 22 824 tonnes in 2019 to 11 954 tonnes and resulted in reduced earnings from US\$10.2 million to US\$6.5 million (Table

10.4). The decline in earnings was reflective mostly of the reduced volume of exports and lower prices for the product. The United States of America accounted for the majority of export, 10 690 tonnes, while

the remainder was exported to other destinations in the Caribbean. There was no export of sugar to the European Union compared with 6 600 during 2019 (see Table 10.4).

The average ex-factory price for sugar increased by 27.2 percent to \$128 415.00 per tonne in comparison with the



3. The amount of sugar cane used to produce one tonne of sugar

TABLE 10.4
SUGAR EXPORTS BY DESTINATION, 2016 - 2020

DESTINATION	2016		2017		2018		2019		2020	
	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000
EUROPEAN UNION	24 136	8 930.2	19 000	8 745.0	20 255	6 863.0	6 600	1 947.0	0	0
USA	11 854	6 942.8	11 222	5 158.0	11 074	6 252.0	12 667	6 509.0	10 690	5 856.0
OTHER	2 054	1 428.2	4 745	3 269.0	4 581	2 855.0	3 557	1 740.0	1 264	644
TOTAL	38 044	17 301.3	34 967	17 172.0	35 910	15 970.0	22 824	10 196.0	11 954	6 500.0

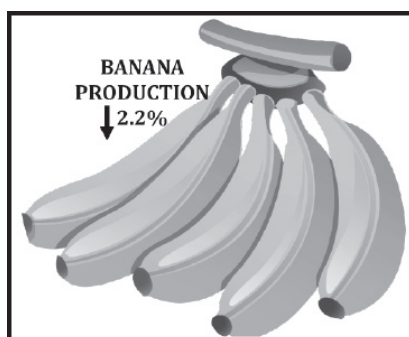
Discrepancies in table due to rounding

Source: Sugar Industry Authority

ex-factory price for 2019, which averaged \$100 926 per tonne (Table 10.6). The main determinant of this increase in price was the focus on sugar sales predominantly into the domestic market, (which fetches a higher price) as opposed to the export market. The proportionate allocation of the ex-factory price between sugar cane growers and manufacturers for the 2019/2020 crop year continues to be 62:38.

Bananas⁴

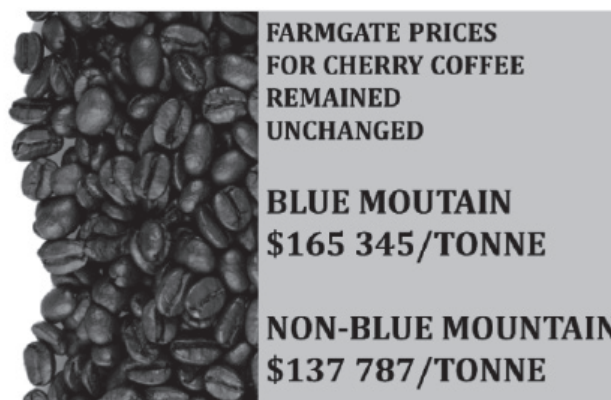
An estimated 62 256 tonnes of bananas was produced (Table 10.5). The reduced out-turn, mainly due to drought conditions, marked the second consecutive year of decline. For five years prior to 2019, there was improved output bolstered by the implementation of the Jamaica Banana Accompany Measures (JBAMs); for which the Banana Export Expansion Programme (BEEP) was a component. The project achieved its specific objective of improving productivity and resilience of small farmers. Additionally, strengthened capacity of farms/agribusinesses enterprises to implement best practices and increased production and productivity; reinforced sustainability of extension



and other technical services and increased availability of planting materials for new disease resistant varieties and high quality traditional cultivars was achieved. The value of bananas exported was US\$726.0 thousand compared with an export value of US\$577.0 thousand in 2019.

Coffee

For the 2019/2020 crop year (August 2019–July 2020), the volume of coffee berries delivered to processing plants



grew by 28.3 per cent to 7 170 tonnes (see Table 10.5). The upturn in coffee production were mainly attributed to the following:

- good balance between rainfall and dry periods, which allowed for the timely application of plant nutrition.
- variation in climatic conditions prevented the escalation of phyto-sanitary issues, thus enabling

4. Based on national accounting conventions stipulated by the Statistical Institute of Jamaica, banana production for both export and domestic consumption is captured in the Traditional Export Crop category.

TABLE 10.5
PRODUCTION OF SELECTED TRADITIONAL EXPORT CROPS, 2016–2020

PARTICULARS	CROP-YEAR	UNIT	2016	2017	2018 ^r	2019 ^r	2020 ^p	% Change 2020/2019
1. Bananas	January - December	Tonnes	58 702	64 815	66 381	63 653	62 256	-2.2
2. Citrus	July - June							
Estimated Total Production		Tonnes	74 217	72 990	70 758	72 713	n/a	-
Sweet Orange			70 364	68 879	66 124	68 135	n/a	-
Grapefruit			562	607	518	479	n/a	-
Ortanique			2 892	3 136	3 714	4 017	n/a	-
Ugli			399	368	402	382	n/a	-
3. Coffee (Cherry)	August - July							
Estimated Total Production		Tonnes	7 580	6 222	7 085	5 587	7 170	28.3
Blue Mountain			6 987	5 438	6 335	5 212	6 603	26.7
Non- Blue Mountain			593	784	750	375	567	51.2
4. Cocoa	October - September							
Estimated Deliveries		Tonnes	726	305	235	367	268	-27.0
5. Coconut	January - December	Millions	101.1	126.3	129.4	129.0	108.8	-15.7

Notes: Conversions

Coffee 1 Box = 27.216 Kg.

Cocoa 1 Box = 25.0 Kg.

r – revised

p – preliminary

n/a – not available

Source: Based on data supplied by Commodity Boards and the Ministry of Agriculture Forestry & Fisheries

greater efficiency in pests and disease management practices, in particular for the Coffee Leaf Rust Disease.

There was higher production of Blue Mountain and Non-Blue Mountain coffee by 26.7 per cent to 6 603 tonnes and 51.2 per cent to 567 tonnes, respectively.

The stagnation in the price of cherry coffee resulted from, among other things, the contraction in demand, due to the loss of business in the hospitality sector, transshipment challenges and other market unpredictabilities.

Coconut

An estimated 108.8 million coconuts was produced compared with 129.0 million in 2019 (see Table 10.5). To



boost production, the Coconut Board continued with measures to reduce the spread of the Lethal Yellowing disease, which included travelling to the affected parishes (mainly St Thomas and Portland) and removing and burning infected trees and replacing them with healthy coconut trees. Lethal Yellowing diseased trees removed totalled 1 898 compared with 3 750 in 2019. A total of 49 757 seedlings were distributed to farmers compared with 44 753 in 2019.

Cocoa

The volume of wet cocoa beans delivered to fermentaries for the 2019/2020 crop year (October 2019–September 2020) was estimated at 268 tonnes compared with 367 tonnes during the previous crop year (see Table 10.5). The contraction in output was due to adverse weather conditions and the impact of the Frosty Pod Rot (FPR) Disease. The disease management protocol requires the total removal of pods, which continue to affect production. The year's out-turn reversed the growth in production in the previous year, brought about by measures introduced to combat the disease. The disease which invades growing cocoa pods on trees, damaging them and the beans they produce, was first confirmed in Jamaica in 2016.

TABLE 10.6
FARMGATE PRICES OF SELECTED TRADITIONAL EXPORT CROPS, 2016–2020

PARTICULARS	UNIT	2015	2016	2017	2018	2019 ^r	2020 ^p	% Change 2020/2019
1. Sugar	J\$/Tonne	70 419	56 607	71 895	82 791 ^r	100 926	128 415	27.2
2. Bananas								
Price to Growers	J\$/Tonne	80 000	88 000	88 000	88 000	88 000	88 000	0.0
3. Citrus								
Oranges	J\$/Tonne(Solids)	302 400	302 400	291 200	314 600	319 725	n/a	-
Ortaniques	J\$/Tonne(Solids)	302 400	302 400	291 200	314 600	319 725	n/a	-
Grapefruits	J\$/box	450	450	550	800	950	n/a	-
4. Coffee								
Price to Growers								
- Blue Mountain	J\$/Tonne	264 552	349 062	349 062	220 460	165 345	165 345	0.0
- Non-Blue Mountain	J\$/Tonne	128 602	128 602	128 602	129 337	137 787	137 787	0.0
5. Cocoa	J\$/Tonne	200 000	260 000	260 000	260 000	260 000	300 000	15.4
6. Pimento	J\$/Tonne	418 875	440 920	440 920	440 920	539 000	n/a	-
7. Coconut Seeds	J\$/Seed	50	55	55	55	55	62.5	13.6

p – preliminary
r – revised
n/a – not available

Source: Based on data supplied by Commodity Boards and the Ministry of Agriculture, Forestry & Fisheries

For the 2019/2020 crop year, the farmgate price paid to farmers for cocoa was \$300 00.0. per tonne compared with \$260 000.00 per tonne during the previous crop year (see Table 10.6). For the 2020 calendar year, the value of exports was US\$348 000 relative to US\$454 000 in 2019.

OTHER AGRICULTURAL CROPS

The increase was supported by growth in four of the nine domestic crop groups Fruits by 11.1 per cent, Yams by 0.1 per cent, Other Tubers by 5.1 per cent and Potatoes by 9.7 per cent. Declines were recorded for Legumes by 11.7 per cent, Vegetables by 1.7 per cent, Condiments by 1.9 per cent, Cereals by 2.0 per cent and Plantain by 2.8 per cent. Also supporting the increase in the Other Agricultural Crops sub-index were:

- relatively favourable weather conditions at the start of the year
- assistance to farmers under the PIP, in the form of fertilizers and seeds
- measures implemented by government to soften the effects of the pandemic.



Further expansion was stifled by adverse weather conditions, drought conditions during April–June and flooding from heavy rains in the October–December quarter, resulting in damage to domestic crops.

There was an increase of 1.5 per cent to 46 835.6 hectares in the area of Domestic Crops reaped. The three top parishes were St Elizabeth with 11 135.4 hectares up 1.0 per cent, Trelawny with 6 490.2 hectares up 2.1 per cent, and

TABLE 10.7
DOMESTIC CROP PRODUCTION, 2016–2020

PARTICULARS	UNIT OF MEASUREMENT	2016	2017	2018	2019 ^r	2020 ^p	% Change 2020/2019
DOMESTIC FOOD CROPS	Tonnes	668 501	632 727	678 446	698 080.2	697 678.8	1.2
Legumes	Tonnes	5 550	5 278	4 630	4 496.6	3 972.3	-11.7
Gungo Peas		879	752	760	677.0	503.3	-25.7
Red Peas		1 039	927	857	873.4	924.2	5.8
Peanut		2 904	2 878	2 277	2 277.0	1 896.4	-16.7
Other Legumes		728	721	736	670.0	649.0	-3.1
Vegetables	Tonnes	243 487	230 093	246 159	242 165.1	237 948.6	-1.7
Cabbage		37 689	35 818	39 135	38 392.0	36 286.0	-5.5
Callaloo		16 490	16 338	17 025	16 710.0	15 976.0	-4.4
Carrot		28 371	24 274	26 264	25 006.0	25 187.0	0.7
Cho Cho		5 056	5 453	4 765	4 336.2	4 181.4	-3.6
Cucumber		19 006	18 387	19 216	18 742.2	19 431.0	3.7
Lettuce		14 126	13 313	15 630	14 821.0	14 997.0	1.2
Okra		6 922	6 570	6 668	6 838.0	6 829.2	-0.1
Pumpkin		53 497	50 494	53 987	56 937.0	59 026.0	3.7
Tomato		31 427	27 545	30 450	28 270.2	25 495.0	-9.8
Other Vegetables		30 903	31 901	33 019	32 114.0	30 542.0	-4.9
Condiments	Tonnes	52 001	45 884	52 176	51 269.2	50 290.1	-1.9
Escallion		14 830	10 714	14 304	10 521	8 830.2	-16.1
Onion		1 092	818	827	1 637	1 757.0	7.4
Hot Pepper		16 067	14 520	15 998	18 106	18 847.0	4.1
Sweet Pepper		18 494	18 282	19 571	19 396	18 990.4	-2.1
Other Condiments		1 518	1 550	1 475	1 609	1 866	16.0
Fruits	Tonnes	54 255	51 894	62 127	64 533.1	71 714.7	11.1
Cantaloupe		4 374	3 053	3 844	3 365.4	3 172.0	-5.7
Paw-Paw		8 583	7 705	9 537	10 999.3	10 825.0	-1.6
Pineapple		25 296	25 848	31 998	33 938.2	41 536.0	22.4
Watermelon		16 002	15 289	16 749	16 230.2	16 182.2	-0.3
Cereals	Tonnes	2 354	2 540	2 177	2 058.4	2 017.8	-2.0
Corn		2 340	2 539	2 177	2 058.4	2 017.8	-2.0
Rice		14	1	0	0.0	0.0	-
Plantain	Tonnes	43 437	46 093	49 907	46 111.0	44 822.4	-2.8
Horse Plantain		32 100	34 671	37 510	34 736.0	34 034.2	-2.0
Other Plantain		11 336	11 422	12 398	11 375.2	10 788.2	-5.2
Yams	Tonnes	156 103	144 319	148 675	165 046.7	165 169.0	0.1
Lucea		12 325	10 851	10 781	9 428.4	8 916.0	-5.4
Negro		13 220	10 926	12 640	14 864.1	12 003.0	-19.2
Renta		8 050	8 207	8 733	8 731.3	8 607.0	-1.4
StVincent		2 273	2 057	1 989	1 652.0	1 616.0	-2.2
Sweet		1 867	1 503	1 724	1 664.0	1 951.0	17.2
Tau		3 359	3 280	3 519	3 424.2	3 672.0	7.2
Yellow		111 778	105 653	107 470	123 623.1	126 820.0	2.6
Other Yam		3 233	1 842	1 818	1 660.1	1 585.2	-4.5
Other Tubers	Tonnes	44 893	46 229	49 850	53 216.0	55 955.0	5.1
Bitter Cassava		6 367	5 508	4 941	5 031.0	4 873.0	-3.1
Sweet Cassava		15 449	15 255	17 903	21 498.3	26 960.4	25.4
Coco		9 803	10 430	10 413	10 131.0	9 651.0	-4.7
Dasheen		13 274	10 036	16 593	16 556.0	14 471.0	-12.6
Potatoes	Tonnes	65 013	59 144	61 594	58 905.1	64 657.1	9.7
Irish		17 007	17 148	16 184	15 717.0	14 685.2	-6.6
Sweet		48 006	41 996	45 410	43 188.0	49 972.0	-15.7
Sorrel^a	Tonnes	1 408	1 253	1 152	1 280.2	1 132.0	-11.6

a – Sorrel, although placed in the crop group column, represents a single crop and therefore is not regarded as a crop group

p – preliminary

r – revised

Discrepancies in table due to rounding

Source: Ministry of Agriculture, Forestry & Fisheries

TABLE 10.8
DOMESTIC FARMGATE PRICE INDEX, 2016 - 2020
 2007 = 100

	2016	2017	2018	2019	2020	%Change 2020/2019
Legumes	235.3	227.0	272.6	283.7	286.9	1.1
Roots & Tubers	199.7	225.4	271.0	266.1	381.9	43.5
Other Tubers	231.4	237.2	246.6	294.6	326.9	10.9
Cereals	285.7	287.6	306.4	308.1	315.2	2.3
Condiments	132.4	219.9	174.0	216.2	238.3	10.2
Fruits	160.3	166.8	179.4	203.2	218.3	7.4
Vegetables	159.5	192.3	186.8	221.6	266.7	20.4
Overall Index	189.5	213.4	237.7	251.8	326.6	29.7

Discrepancies in table due to rounding

Source: Planning Institute of Jamaica

Manchester at 6 218.1 hectares down 1.5 per cent. These combined accounted for 51.0 per cent of the total area of Domestic Crops reaped compared with 51.3 per cent in 2019.

The crop group Vegetables at 14 615.0 hectares (31.2 per cent of total hectares reaped), accounted for the largest area of domestic crops reaped. This was followed by Yams with 9 668.8 hectares and Condiments with 3 772.4 hectares, 20.6 per cent and 8.1 per cent of total hectares reaped, respectively.

Reflecting reduced supplies of the (heavier weighted) Domestic Crops, the Domestic Farmgate Price Index showed an average expansion of 29.7 per cent (Table 10.8). Higher prices were recorded by all sub-indices, with the heavily weighted Roots & Tubers (at approximately 37.9 per cent), increasing by 43.5 per cent. This corresponded with the reduced supplies of seven of the ten crop groups represented in the Roots & Tubers Farmgate Price sub-index, including Irish potatoes, sweet potatoes, and luca, negro & renta yams (see Table 10.7). The increase in the Farmgate price for the Vegetables sub-index was consistent with lower production of cabbage, callaloo, tomato among others. Reduced supplies of escallion and sweet pepper contributed to a higher price index for Condiments. Increased Farmgate prices were also recorded for Legumes, Other Tubers, Cereals and Fruits, consistent with decreased supplies of some products in these categories (see Table 10.7 and 10.8).

ANIMAL FARMING⁵

The decline in the Animal Farming sub-industry mainly reflected a downturn in poultry meat production, which comprised 75.0 per cent of the sub-industry, by 8.0 per cent to 123 636 tonnes. (Table 10.9). The number of cattle slaughtered grew to 27 439 from 26 566, resulting in an increase in Beef & Veal production. Milk production increased to 13.0 million litres from 12.7 million. With regard to livestock slaughtered, declines were recorded for Hogs, Goats and Sheep, resulting in corresponding decreases in Pork by 4.4 per cent to 7 986 tonnes, Goat's Flesh by 17.5 per cent to 633 tonnes and Mutton by 33.3 per cent to 4 tonnes (See Table 10.9). Inclusive of poultry meat, these fallouts may be attributed to reduced demand from the Hotels & Restaurant industry and the domestic market.



Egg production
208.2 million
↑24.9%

FISHING

There was an estimated decline in Fish production (10.2 per cent). Contributing to this out-turn were respective reductions of 9.3 per cent to 11 226 tonnes and 20.4 per cent to 912 tonnes in marine and aquaculture (Tilapia) fish production (Table 10.9). The fall-off in the former was attributed to the scaling down of operations of many hotels and food establishments consequent on measures to stem the spread of COVID-19; climate change effects; illegal, unregulated, unreported fishing and the increasing prices of fuel for outboard engines, that limited fishing activities.

5. Animal Farming includes Beef & Veal, Pork, Goat's Flesh, Mutton, Poultry, Eggs and Milk production.

TABLE 10.9
LIVESTOCK PRODUCTION, 2016–2020

PARTICULARS	UNIT OF MEASUREMENT	2016	2017	2018	2019 ^r	2020 ^p	% Change 2020/2019
LIVESTOCK SLAUGHTER							
	Heads						
Cattle	"	27 563	25 320	25 397	26 566	27 439	3.3
Hogs	"	129 559	123 810	124 176	121 999	111 140	-9.7
Goats	"	60 074	59 671	48 619	41 965	37 969	-9.5
Sheep	"	602	342	386	243	195	-19.8
MEAT, EGGS AND DAIRY							
Beef & Veal	000 kgs.	7 712	6 694	6 813	7 118	7 124	0.1
Pork	" "	9 857	8 965	8 786	8 355	7 986	-4.4
Goat's Flesh	" "	1 069	925	751	767	633	-17.5
Mutton	" "	12	9	9	5.8	4.7	-19.0
Poultry	" "	125 993	128 290	132 347	134 250	123 636	-7.9
Eggs	Million	174.3	184.1	192.2	166.7	208.2	24.9
Milk	Million Litres	12.1	13.2	14.2	11.9	12.3	3.4
FISH							
Aquaculture (Tilapia, Basa)	Tonnes	1 021	1 334	1 213	1 146	912	-20.4
Marine (Fish, Conch, Lobster, Shrimp)	" "	12 940	14 931	11 213	12 372	11 226	-9.3

r – revised

p – preliminary

Discrepancies in table due to rounding

Source: Ministry of Industry, Commerce, Agriculture & Fisheries

For Tilapia, this was the third consecutive year of decline, reversing five years of steady increases (2012–2017). The decline in harvest stemmed from an unavailability of juvenile fishes for farmers to grow, setback brought about by the pandemic and tropical storm conditions, which resulted in fish wash-out, infrastructural and road damage.

There were 24 039 registered fisherfolks and 7 663 registered vessels operating from 178 fishing beaches and two cays located at the Pedro Bank. This compared with 23 305 registered fisherfolks and 7 179 registered boats operating from the same locations during 2019.

EMPLOYMENT

The average employment⁶ for the Agriculture, Hunting, Forestry & Fishing industry contracted by 233 persons to 187 900. This was a 0.8 percentage point increase in the industry's share of total employed labour force. There was an increase to 46 300 from 47 067 in the average number of females employed in the industry, while male employment declined from 141 833 to 140 833. The male/female share of employment within the industry was 75.4 per cent and 24.6 per cent, respectively, compared with 75.0 per cent and 25.0 per cent in 2019.

FINANCING TO THE INDUSTRY⁷

The Development Bank of Jamaica (DBJ), through the People's Cooperative (PC) Bank and other Approved Financial Institutions (AFIs) continued to provide loans to viable agriculture and agro-processing projects. The uptake of loans in local currency funds was \$688.1 million compared with \$519.4 million in 2019 (Table 10.10). A total of 575 loans were disbursed compared with 1 898 in 2019. The increase in funds loaned reflected greater uptake of loans for projects in both categories, Agriculture by 9.2 per cent to \$561.8 million and Agro-Processing by \$126.2 million from \$5.0 million. The higher loan disbursement for agricultural projects was propelled by growth in loan uptake for Crops, \$450.0 million relative to \$45.1 million in 2019. For the Micro Financing Industry (MFI), the value of agricultural loans fell from \$270.4 million to \$55.3 million. With regard to the Agro-Processing category, Food Processing, at



6. Average Employment represents data for January, July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for industry composition. At the time of writing comparable data was only available for January, July and October.

7. This represents financing linked to the Development Bank of Jamaica.

TABLE 10.10
DEVELOPMENT BANK OF JAMAICA: LOAN ALLOCATION TO THE AGRICULTURE INDUSTRY:2016–2020
(J\$ '000)

SUB-INDUSTRIES	2016	2017	2018	2019	2020
Crops					
Bananas/Plantain	0	0	0	0	0
Citrus	0	0	0	0	0
Coffee	0	3 000	0	0	0
Cocoa	0	0	0	7 000	0
Greenhouse Vegetables	37 722	0	0	0	0
Horticulture/Aquaculture	5 000	0	20 000	30 000	0
Irish Potatoes	0	0	0	0	0
Onion	0	0	1 600	0	450 000
Other Crops	15 000	0	0	8 066	0
Papaya	3 000	0	0	0	0
Pepper	0	0	1 500	0	0
Pumpkin	0	0	0	0	0
Sugar Cane	0	0	0	0	0
Sweet Potatoes	0	0	0	0	0
Vegetables	10 000	0	4 100	0	0
Yams	0	0	0	0	0
			0	0	0
SUB-TOTAL	70 722	3 000	27 200	45 066	450 000
Livestock					
Bee Keeping	0	0	3 000	0	0
Cattle	8 470	0	0	0	0
Fishing	63 000	0	0	0	0
Piggery	0	0	0	0	0
Eggs	0	0	0	0	31 500
Poultry	528 169	433 317	197 663	198 900	25 024
Small Stock (sheep, goat)	0	0.0	4 000	0	0
SUB-TOTAL	599 639	433 317	204 663	198 900	56 524
Farm Infrastructure & Vehicle			0	0	0
Biodigester	0	0	0	0	0
Farm Buildings	0	0	0	0	0
Farm Equipment	0	0	0	0	0
Farm Store	0	0	0	0	0
Farm Vehicle	0	0	0	0	0
Other/Energy	20 300	13 367	0	0	0
SUB-TOTAL	20 300	13 367	0	0	0
AFI & Direct	0	0	231 863	246 966	506 524
MFI	144 071	154 357	182 223	270 430	55 302
TOTAL AGRICULTURE	834 732	604 041	414 086	514 396	561 826
AGRO-PROCESSING					
Agro-Processing Commodity	90 000	0	0	0	0
Beverages/Juices	0	0	5 000	0	0
Food Processing	0	13 300	0	0	126 250
AFI & Direct	90 000	13 300	5,000.0	0.0	126 250
MFI			350	5 000	0
SUB-TOTAL	90 000	13 300	5 350	5 000	126 250
GRAND TOTAL	924 732	617 341	419 436	519 396	688 076

Source: Development Bank of Jamaica

TABLE 10.11
INTEREST RATES APPLIED TO AGRICULTURAL
LOANS, 2020

LINES OF FUNDING	RATE TO AFI (%)	RATE TO SUB-BORROWER (%)
DBJ Regular	5.75	8.75
DBJ MFI Micro	8.80	Maximum of 0.85% per week
DBJ MFI SME	8.80	Maximum of 25% per annum
DBJ - Direct	n/a	5.0
DBJ WB SME (FCGP)	5.25	AFI's current market rate
DBJ Regular - US\$	4.25	7.25

Source: Development Bank of Jamaica

at the end of 2019 (Table 10.12). Loans issued was \$18 455.0 million and the total repaid was \$15 237.5 million. This compared with \$18 107.4 million and \$14 895.8 million for loans and repayment in 2019, respectively. For Commercial Banks, the stock of loans outstanding was \$501.9 million (15.6 per cent of total loans outstanding) compared with \$657.6 million (20.5 per cent of total loans outstanding) at the end of 2019. There were no foreign currency loan approvals for the Agriculture sector during the year.

TABLE 10.12
AGRICULTURAL CREDIT, 2016 - 2020
(J\$'000)

INSTITUTIONS	2016	2017	2018	2019	2020
Development Bank of Jamaica					
Total Loans Outstanding	3 445 914	2 602 325	2 970 093	3 211 636	3 217 476
Loans Issued (Disbursed)	16 506 366	17 168 599	17 588 035	18 107 431	18 455 020
Loans Repaid	13 060 452	14 566 274	14 617 942	14 895 795	15 237 544
Commercial Banks					
Loans and Advances					
Outstanding	2 407 110	1 708 371	718 201	657 617	501 882

Source: Development Bank of Jamaica

\$126.3 million accounted for the growth. There was no disbursement of loans to the Agro-Processing category in 2019 (see Table 10.10)

The rate at which farmers accessed loans and the wholesale lending rate to AFIs varied based on the line of credit (Table 10.11). The rate offered by the DBJ in collaboration with MOAF and made available through the Dairy Revitalization line of credit to dairy farmers and the CDB/MOAF⁸ line of credit remained unchanged at 5.0 per cent. It also remained the lowest rate offered to Sub-borrowers. The CDB line of credit at 9.5 per cent was the highest rate offered to farmers. With regard to rates to the AFI, the DBJ/MFI lines of funding allocated to projects from the Micro Finance Institutions at 8.8 per cent, was 1.0 percentage point lower than in 2019. These funding attracted higher levels of interest rates due to the limited collateral requirements.

The total stock of agricultural loans outstanding to the DBJ was \$3 217.5 million compared with \$3 211.6 million

OUTLOOK

Higher RVA is anticipated for the Agriculture, Forestry & Fishing industry in 2021, as the economy rebounds from the negative impact of the COVID-19 pandemic. This is predicated on the support of the Ministry, through the continued implementation of its medium-term priorities, to include the promotion of market-driven initiatives (PIP; ACP Bridging Programme, EVADP, and the South Plains Agricultural Development Project), among others. The industry should also benefit from measures to stem the spread of the virus (locally and internationally), thereby easing the impact of restriction on movement on the industry and linkage industries, such as Manufacture and Hotels & Restaurants. The anticipated abatement in supply chain disruptions and demand shocks should facilitate increased income and improved demand for agricultural goods and services. ■

8. The CDB/MOAF line of funding was negotiated prior to the name change from MOAF to MICAF.

MINING AND QUARRYING

INTRODUCTION

Real Value Added (RVA) for the Mining & Quarrying industry contracted by 21.5 per cent compared with 2019 and represented the largest annual decline since 2009 (50.4 per cent), following the closure of three alumina plants (Figure 11A). The industry’s performance was attributed to respective declines of 25.4 per cent to 1 620.9 kilo tonnes and 2.5 per cent to 3 001.7 kilo tonnes in the production of Alumina and Crude Bauxite (Table 11.1). The decline in Alumina output was due to the JISCO Alpart plant not being operational during the period, compared with it being operational for nine months in 2019. Production of Crude Bauxite was impacted by decreased demand from third-party overseas purchasers. Export of Crude Bauxite increased by 0.8 per cent to 3 061.5 kilo tonnes while export of Alumina fell by 25.2 per cent to 1 654.1 kilo tonnes. Earnings for 2020 totalled US\$527.6 million, a decrease of 35.2 per cent compared with 2019.

POLICY & PROGRAMMES

The Mining & Quarrying industry continued to be guided by the Mining Act, 1947¹, the Quarries Control (Amended) Act, 1984², the Gun Powder and Explosive (Amended) Act, 1925³. The Ministry of Transport & Mining (MTM), in keeping with the goal and strategies of the Vision 2030 Jamaica – National Development Plan, and the Medium-Term Socio-Economic Policy Framework (MTF) 2018–2021, pursued policies and programmes geared towards continued advancement and development of the Mining & Quarrying industry. A number of activities were undertaken to develop the industry.

National Minerals Policy (NMP) and Action Plan

The NMP, which seeks to create the framework to attract investment in the Industrial and Metallic Mineral subsector, was passed by both the Houses of Parliament in March and is currently being implemented. An addendum to the NMP is being developed to give more attention to the

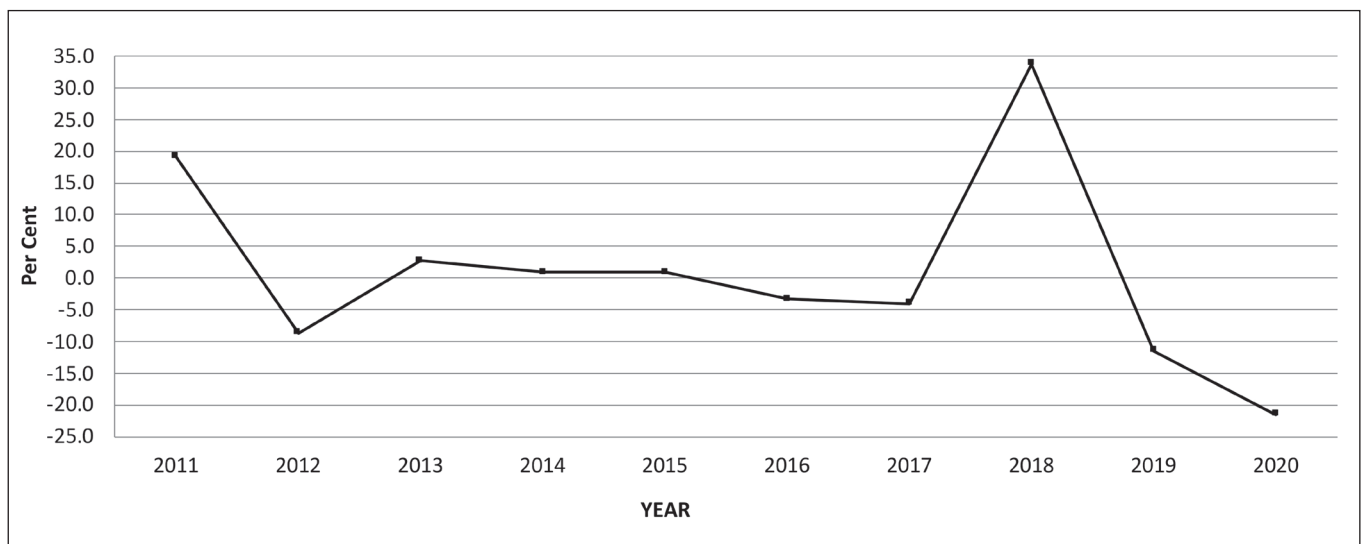


FIGURE 11A: REAL VALUE ADDED FOR MINING & QUARRYING 2011–2020

1. Last amendment: January 1, 1995
2. Last amendment: January 1, 1995
3. Last amendment: January 1, 1985

Industrial Minerals sector for the creation of an Industrial Minerals Policy that seeks to, among other things, promote transparency, accountability and sustainability, as well as increase competition and investment. The Industrial Minerals Policy is currently in the Concept Paper Phase; Green Paper submission is targeted for December 2021.

Bauxite Land Titling Programme (BLTP)

The BLTP, which seeks to provide land titles to persons that were resettled by bauxite mining companies, delivered 135 titles during the year, bringing the total number of titles issued since the inception of the programme to 1 221. A total of 3 435 remain to be delivered of which 145 have been prepared.

ACP-EU MINERALS FOR DEVELOPMENT PROGRAMME

Work continued on Phase II of the programme which commenced November 2019 and is valued at US\$600 000. The focus of Phase II of the programme continues to be on capacity building, enhancing the business environment and improving access to finance and investment, among other things. Activities undertaken/funded included:

- Publication of guidelines on the updated Quarries Control Act
- Development of a Business Handbook and Training Resource Publication
- Development of a Mining Cadastral System to facilitate online monitoring of mines and quarries, as well as increased efficiency in responding to environmental breaches. This is expected to be implemented in 2021.
- Market and Value Chain training to promote sustainable mining practices as well as the development and production of mineral products with components which are free from hazardous materials that would damage the environment
- Development of a Bachelor's Degree programme in Quarry Management, which is expected to be rolled out in academic year 2021/22
- Disbursement of 12 grants valued at US\$62 000 to private sector entities to assist in mitigating the impact of Coronavirus 2019 disease (COVID-19) pandemic on the industry.

INTERNATIONAL ENVIRONMENT

Aluminium Market

Global demand for aluminium was 62 343.0 kilo tonnes, a decrease of 3.4 per cent compared with 2019. This decline was attributed mainly to the negative impact of the COVID-19 pandemic on activities linked to the global

construction and transportation industries. Lower demand from all regions led to this out-turn and was disaggregated as follows:

- Europe, by 11.3 per cent to 7 998.2 kilo tonnes
- North America, by 14.1 per cent to 5 484.8 kilo tonnes
- Central & South America, by 9.3 per cent to 1 016.8 kilo tonnes
- Asia, by 0.1 per cent to 47 141.0 kilo tonnes
- Africa, by 14.8 per cent to 511.1 kilo tonnes
- Australasia, by 6.4 per cent 191.1 kilo tonnes.

However, consumption from China the largest consumer in the world, increased by 4.0 per cent to 37 645.3 kilo tonnes and accounted for the 60.4 per cent of total consumption.

Worldwide production of aluminium, increased by 4.1 per cent to 64 789.3 kilo tonnes. The higher level of output was mainly due to production in China, which moved from 35 287.2 to 36 731.8 kilo tonnes and accounted for 56.7 per cent of global output. Output from North America grew by 3.8 per cent to 4 099.6 kilo tonnes, while lower production was recorded in Europe (by 1.2 per cent to 8 082.4 kilo tonnes) and Central & South America (by 8.9 per cent to 995.5 kilo tonnes; production in Australasia remained flat at 1 918.2 kilo tonnes.

Average Aluminium price on the London Metal Exchange (LME)

The average price of aluminium on the LME was US\$1 703.99 per tonne compared with US\$1 794.49 in 2019. This fall in price was the result of an increase in the global supply of aluminium as well as a decrease in demand globally, partly reflecting the impact of COVID-19 on the automotive industry. Automotive factories in the largest markets were temporarily shut down during the onset of the pandemic and this led to a downward pressure on the price of aluminium.

Alumina Market

Consistent with the increase in aluminium production, global demand of alumina increased by 2.9 per cent to 126 768.6 kilo tonnes. Higher demand was due to increased consumption from Asia by 4.0 per cent to 94 325.0 kilo tonnes and North America by 3.8 per cent to 7 936.8 kilo tonnes. Demand from China grew by 4.7 per cent to 72 328.4 kilo tonnes and accounted for 57.1 per cent of global demand. Lower demand was recorded for Europe by 1.2 per cent to 15 752.3 kilo tonnes, South America by 8.6 per cent to 1 934.4 kilo tonnes and Africa by 2.4 per cent to 3 106.5 kilo tonnes. Demand from Australasia remained flat at 3 713.6 kilo tonnes.

Global production of alumina improved by 2.0 per cent to 127 008.0 kilo tonnes, with five of six regions recording

TABLE 11.1
JAMAICA BAUXITE/ALUMINA PRODUCTION AND EXPORTS
2016–2020 ('000 TONNES)

	2016	2017	2018	2019 ^r	2020 ^p	% Change	
						2019 2018	2020 2019
PRODUCTION							
Crude Bauxite (a)	3 596.9	3 375.6	3 366.5	3 080.1	3 001.7	-8.5	-2.5
Alumina	1 865.3	1 782.4	2 483.6	2 173.0	1 620.9	-12.5	-25.4
Bauxite Equivalent of Alumina (b)	4 943.2	4 869.1	6 691.7	5 942.2	4 544.4	-11.2	-23.5
Total Bauxite Production (c)	8 540.1	8 244.6	10 058.2	9 022.3	7 546.1	-10.3	-16.4
EXPORTS							
Crude Bauxite (a)	3 455.4	3 340.4	3 339.2	3 035.8	3 061.5	-9.1	0.8
Alumina	1 833.9	1 743.1	2 571.0	2 212.0	1 654.1	-14.0	-25.2
Bauxite Equivalent of Alumina (b)	4 860.4	4 778.2	6 933.0	6 056.0	4 640.2	-12.6	-23.4
Total Bauxite Exports (c)	8 315.8	8 118.6	10 272.3	9 091.8	7 701.7	-11.5	-15.3
Real Value Added Growth Rates(%)	-3.3	-4.1	33.8	-11.4	-21.5	n/ap	n/ap

Discrepancies due to rounding errors

Note : (c) = (a) + (b)

Bauxite Equivalent of Alumina is unprocessed bauxite used in alumina production

n/ap – not applicable

p – preliminary

r – revised

Source: Jamaica Bauxite Institute

higher output. Production from the regions was as follows:

- Asia, up 2.2 per cent to 83 348.9 kilo tonnes
- Australasia, up 3.6 per cent to 20 737.0 kilo tonnes
- South America, up 4.7 per cent to 11 218.1 kilo tonnes
- Europe, up 2.9 per cent to 9 144.9 kilo tonnes
- Africa, up 16.7 per cent to 468.1 kilo tonnes
- North America, down 8.1 per cent to 2 091.1 kilo tonnes.

Output from China, moved from 68 094.1 to 68 562.1 kilo tonnes and accounted for 54.0 per cent of global output.

DOMESTIC ENVIRONMENT

BAUXITE & ALUMINA SUB-INDUSTRY

Domestic Production

The Bauxite & Alumina sub-industry contracted in 2020, stemming from decreased production of both Alumina and Crude Bauxite. The reduction in the output of alumina was the result of there being no production at the Alpart refinery while the production of crude bauxite continued to be affected by lower demand from overseas purchasers.

Total Bauxite

Total bauxite production was 7 546.1 kilo tonnes, a decline of 1 476.2 kilo tonnes compared with 2019. A decrease in the volume of bauxite used in the production of alumina (by 23.5 per cent to 4 544.4 kilo tonnes) and crude bauxite output, led to the overall decline in production (Table 11.1).

Crude Bauxite

Output of Crude Bauxite fell by 2.5 per cent to 3 001.7 kilo tonnes, the 6th consecutive year of a decline. This reduction in output was evident in the Bauxite Capacity Utilization rate for the industry, which moved from 57.6 per cent to 56.1 per cent (Figure 11B).

Alumina

Alumina production declined by 552.1 kilo tonnes to 1 620.9 kilo tonnes. This out-turn was reflected in the Alumina Capacity Utilization⁴ (ACU) rate which was 43.8 per cent, a decrease of 14.9 percentage points relative to 2019 (Figure 11C). This decline was the result of there being no production from the Alpart refinery relative to 611.5 kilo tonnes in 2019. A further decrease in production

4. The Alumina Capacity Utilization rate measures the percentage of productive capacity utilized in the Alumina industry.

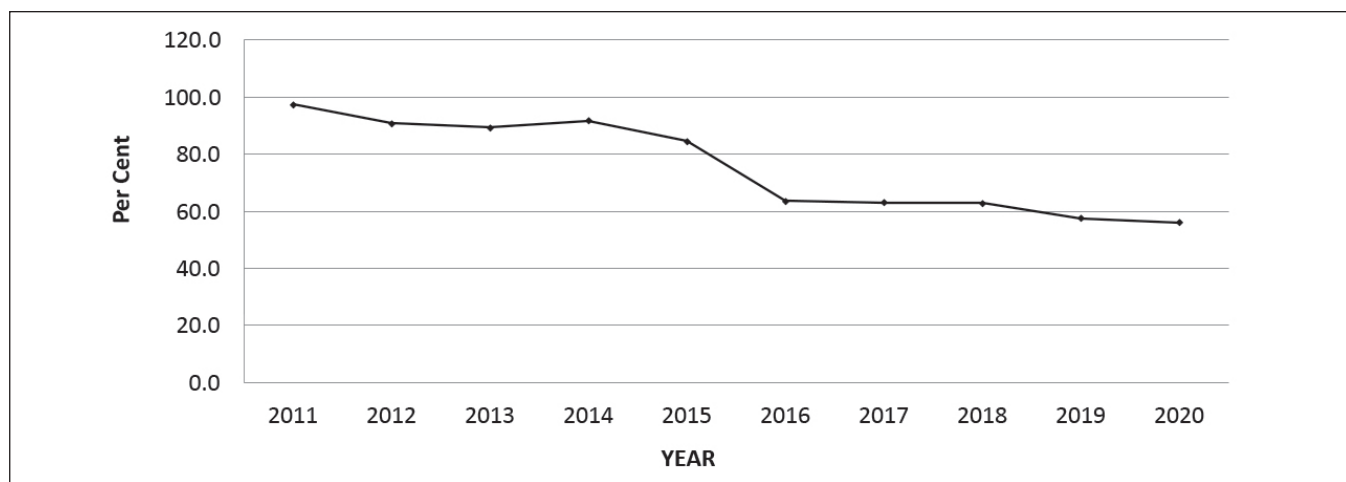


FIGURE 11B : BAUXITE CAPACITY UTILIZATION RATE 2011-2020

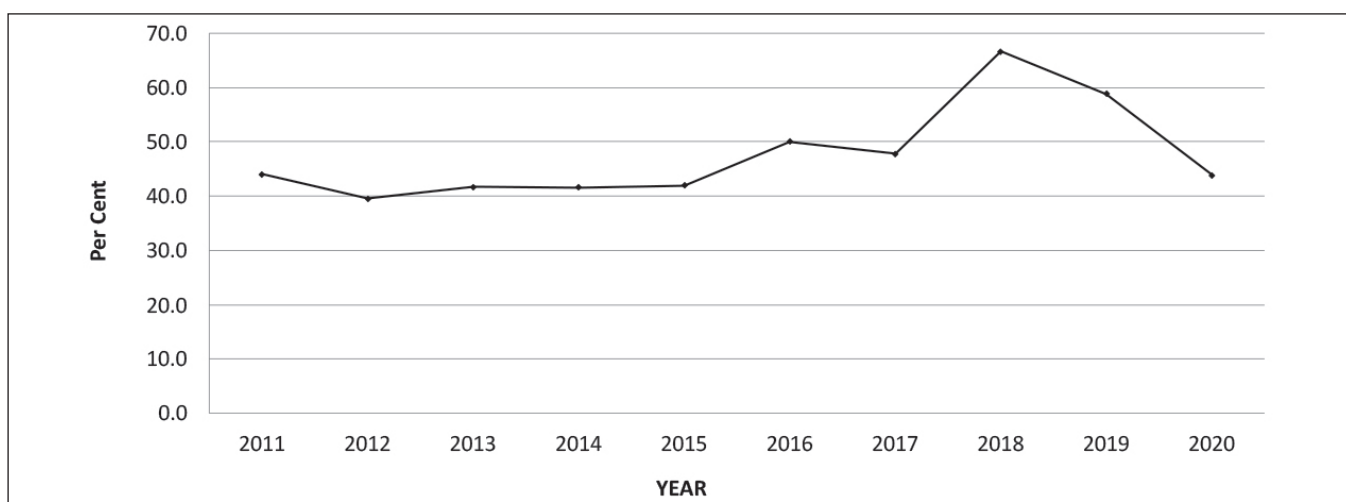


FIGURE 11C: ALUMINA CAPACITY UTILIZATION RATE 2011-2020

was however tempered by increased output from the WINDALCO and JAMALCO plants by 13.8 per cent to 477.8 kilo tonnes and 0.1 per cent to 1 143.1 kilo tonnes, respectively. The ACU rate from the WINDALCO plant grew by 9.2 percentage points to 75.8 per cent while the rate from the JAMALCO plant increased by 0.1 percentage point to 80.7 per cent. Jamaica's share of global alumina production fell by 0.5 percentage point to 1.3 per cent (Figure 11D). This out-turn resulted from an increase in the output of alumina globally, as well as a decline in Jamaica's production.

Alumina Efficiency

Reduced efficiency was recorded for Bauxite/Alumina conversion rate, which was 2.80 tonnes of bauxite per tonne of alumina compared with 2.73 tonnes 2019. However,

there was an improvement in the Caustic Soda/Alumina conversion rate, which fell from 0.155 tonnes of caustic soda per tonne of alumina to 0.131 tonnes.

Alumina Production Cost

The operating cost of production per unit of alumina moved from US\$357.2 per tonne in 2019 to US\$263.1 per tonne (Table 11.2). This reflected declines in the following cost of inputs per unit of alumina produced: Fuel/Energy by 48.5 per cent to US\$76.5; Caustic Soda by 37.5 per cent to US\$41.5; and Labour by 4.8 per cent to US\$23.0. However, the cost per unit of alumina for Bauxite and Other Operating Cost increased by 11.8 per cent to US\$32.2 and 0.6 per cent to US\$90.0, respectively.

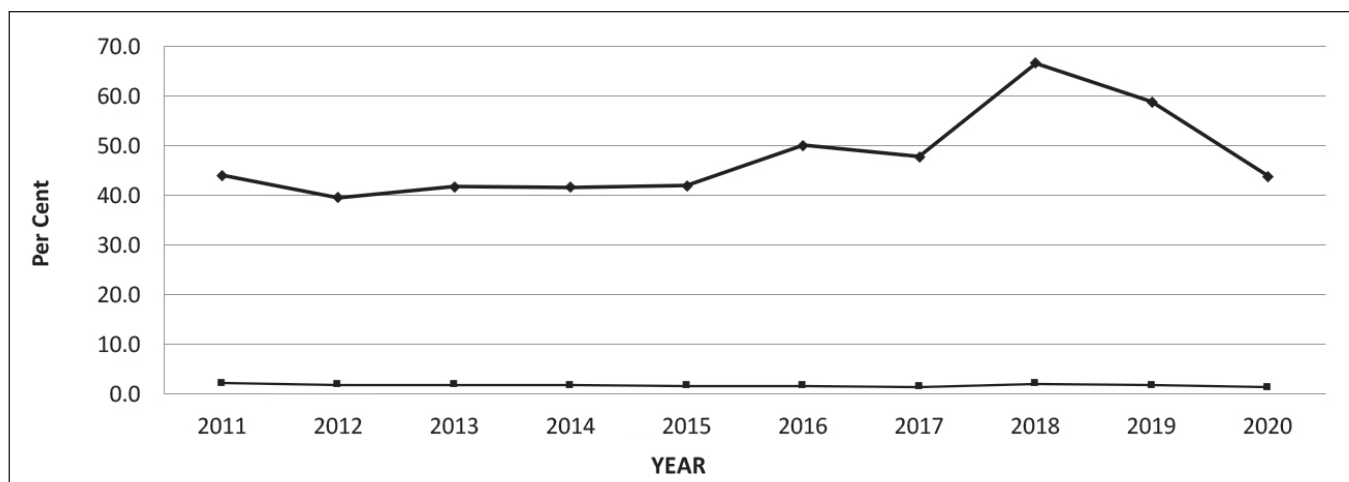


FIGURE 11D: JAMAICA'S ALUMINA PRODUCTION MARKET SHARE, 2011–2020

Exports

Total Bauxite

Export of total bauxite declined by 15.3 per cent to 7 701.7 kilo tonnes (see Table 11.1). A decrease in the volume of the Bauxite Equivalent of Alumina by 23.4 per cent to 4 640.2 kilo tonnes, led to this reduction in exports as the volume of crude bauxite exported increased.

Crude Bauxite

Crude Bauxite export grew by 0.8 per cent to 3 061.5 kilo tonnes. This improvement was attributed to an increase of 2.6 per cent to 2 675.9 kilo tonnes in the volume exported to North America, which outweighed a decrease (by 9.8 per cent to 385.5 kilo tonnes) in the volume exported to Asia.

Alumina

Export of alumina declined by 25.2 per cent to 1 654.1 kilo tonnes (see Table 11.1). This fall was due to a reduction in exports from JAMALCO (by 2.7 per cent to 1 114.0 kilo tonnes) and no exports being recorded from the Alpart refinery compared with 610.4 kilo tonnes exported in 2019. However, shipments from the WINDALCO plant increased by 18.2 per cent to 540.2 kilo tonnes. Shipments to all destinations declined and were disaggregated as follows, Europe (by 30.6 per cent to 1 061.0 kilo tonnes), North America (by 9.6 per cent to 479.5 kilo tonnes), and Africa (by 24.3 per cent to 64.0 kilo tonnes), while there were no shipments to countries classified as Others.

TABLE 11.2
SELECTED COSTS OF PRODUCTION PER UNIT OF ALUMINA PRODUCTION IN THE BAUXITE/ALUMINA SUB-INDUSTRY
2016–2020 (US\$/METRIC TONNE)

	2016	2017	2018	2019	2020 ^p	% Change	
						2019 2018	2020 2019
Bauxite	21.8	22.0	31.0	28.8	32.2	-7.1	11.8
Caustic Soda	31.7	51.5	79.4	66.4	41.5	-16.4	-37.5
Fuel/Energy	55.1	88.7	170.7	148.4	76.5	-13.1	-48.5
Labour	18.1	20.7	24.1	24.1	23.0	0.0	-4.6
Other Operating Cost	74.3	79.2	83.7	89.5	90.0	6.9	0.6
Operating Cost of Production^a	201.2	262.1	388.9	357.2	263.2	-8.2	-26.3

Discrepancies due to rounding

a – Operating costs of alumina production comprise direct and raw materials costs.

p – preliminary

Source: Compiled by PIOJ from data supplied by Jamaica Bauxite Institute

TABLE 11.3
TOTAL VALUE OF EXPORTS & FOREIGN EXCHANGE EARNINGS
2016–2020 (US\$ MILLION)

	2016	2017	2018	2019 ^r	2020 ^p	% Change	
						2019 2018	2020 2019
Crude Bauxite	90.2	83.6	100.3	95.9	88.6	-4.4	-7.6
Alumina	445.5	587.8	1 138.8	718.5	439.0	-36.9	-38.9
Total Export Value	535.6	671.4	1 239.1	814.5	527.6	-34.3	-35.2
Total Profit Sharing Payment (a)	1.4	9.3	4.9	1.7	0.0	-65.1	-100.0
Income Tax (b)	0.0	0.0	0.0	0.0	0.0	n/ap	n/ap
Bauxite Levy (c)	20.9	0.0	2.0	1.2	0.0	-40.0	-100.0
Royalties (d)	4.0	4.0	4.9	6.3	2.6	24.5	-58.7
Local Cost & Net Forex (e)	194.6	243.6	374.8	290.8	273.5	-22.4	-5.9
Foreign Exchange Inflows (f)	220.9	256.9	386.6	300.0	276.1	-22.4	-8.0

Discrepancies due to rounding

(f) = (a) + (b) + (c) + (d) + (e)

n/a – not available

n/ap – not applicable

p – preliminary

r – revised

Source: Compiled from data supplied by Jamaica Bauxite Institute

Earnings

The total export value of Alumina & Crude Bauxite contracted by 35.2 per cent to US\$527.6 million (Table 11.3). This performance was attributed to declines in export value of alumina and crude bauxite, which fell by US\$279.5 million to US\$439.0 million and US\$7.3 million to US\$88.6 million, respectively (see Table 11.3). The lower export earnings of alumina stemmed from the combined effect of a decline in the volume exported as well as a fall in price from US\$324.84 per tonne to US\$265.38 per tonne. A decrease in the average export price by US\$2.66 to US\$28.95 per tonne, led to the fall in earnings from crude bauxite, as there was an increase in the volume of the commodity exported. Foreign exchange inflows moved from US\$300.0 million in 2019 to US\$276.1 million. This was evidenced by no inflows to the Total Profit Sharing Payment and Bauxite Levy categories, as well as declines in Local Cost & Net Foreign Exchange (by US\$17.3 million to US\$273.5 million) and Royalties (by US\$3.7 million to US\$2.6 million).

QUARRYING (INDUSTRIAL MINERALS) SUB-INDUSTRY

There was a downturn in the Quarrying sub-industry relative to 2019. This out-turn reflected a decline in five of the nine products, as one registered no production, while three increased (Table 11.4). The performance of the sub-industry was consistent with reduced activity in the Construction industry. The products with the largest absolute declines included, Marl & Fill (by 617.3 kilo tonnes); Limestone & Whiting (by 436.1 kilo tonnes) and Sand & Gravel (by 374.4 kilo tonnes).

EMPLOYMENT

Average employment in the Mining & Quarrying industry fell by 2 067 persons to 5 033 persons (Figure 11E). The industry accounted for 0.4 per cent of the average total employed labour force, down 0.2 percentage point compared with 2019. When disaggregated by sex, male and female employment within the industry fell by 1 367 persons to 4 300 persons and 700 persons to 733 persons, respectively. Labour productivity for the industry as measured by the average output per worker was \$2.9 million (at constant 2007 prices) compared with \$2.6 million (at constant 2007 prices) in 2019.

TABLE 11.4
PRODUCTION OF INDUSTRIAL MINERALS
2016–2020 ('000 TONNES)

	2016	2017	2018	2019	2020 ^P	% Change	
						2019 2018	2020 2019
Silica Sand	19.8	22.6	24.5	27.7	29.8	13.1	7.6
Limestone & Whiting	2 748.1	2 911.9	3 320.8	3 027.6	2 591.5	-8.8	-14.4
Gypsum	49.7	45.9	47.4	55.0	65.8	16.0	19.6
Marble	0.1	0.2	n/a	n/a	n/a	n/ap	n/ap
Sand and Gravel	1 766.5	1 996.4	1 801.9	1 837.9	1 463.5	2.0	-20.4
Marl & Fill	3 012.5	3 524.1	1 724.1	1 664.2	1 046.9	-3.5	-37.1
Pozzolan	128.6	94.7	93.2	80.3	102.3	-13.8	27.4
Shale	180.8	357.3	254.8	217.4	166.8	-14.7	-23.3
Clay	0.4	0.5	0.6	0.6	0.5	0.0	-16.7

Discrepancies due to rounding

n/a – not available

n/ap – not applicable

p – preliminary

Source: Mines and Geology Division

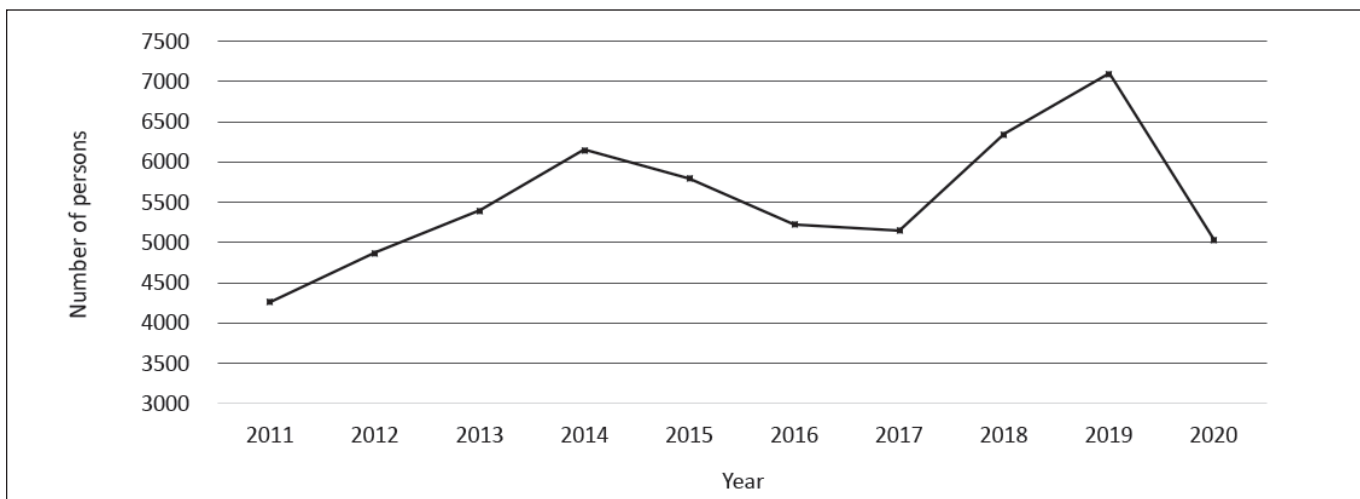


FIGURE 11E: EMPLOYED LABOUR FORCE IN THE MINING & QUARRYING INDUSTRY, 2011–2020

OUTLOOK

Real Value Added for the Mining & Quarrying industry is projected to increase during 2021. This improvement in RVA is predicated on an increase in the production of crude bauxite and alumina. The industry is projected to benefit from growth in aluminium demand, as automotive and

construction industries globally, begin to gradually reopen following the impact of the COVID-19 pandemic.

The Quarrying sub-industry is also projected to grow. This outcome is contingent on an expansion in the local Construction industry and anticipated infrastructure development/ road construction projects. ■

MANUFACTURING

INTRODUCTION

The Manufacturing industry contracted, recording a decline of 5.4 per cent in Real Value Added (RVA) compared with 2019, the largest annual decline since 1997 (6.6 per cent) and the lowest level of RVA since 2015 (Figure 12A). The industry accounted for 9.1 per cent of total RVA but detracted 0.5 percentage point from the change in total RVA. Lower output from the *Food, Beverages & Tobacco* (4.7 per cent) and *Other Manufacturing* (6.3 per cent) sub-industries resulted in this out-turn. The performance primarily resulted from factory closure and lower demand stemming from the effects of the Coronavirus Disease 2019 (COVID-19) and measures implemented to contain its spread nationally and internationally, which led to reduced demand from both markets. However, some producers saw increased demand for some products nationally and internationally. Based on preliminary General Consumption Tax (GCT) data, the decline was also reflected in lower sales of manufacturing goods. Additionally, the performance of the industry was reflected and impacted by a decline in consumer and business confidence as reported by the Business and Consumer Surveys. As a consequence, there was a contraction in employment in the industry.

Public and private sector entities continued work to implement initiatives to improve the business environment and the resources available for manufacturers. However,

some policies and programmes envisioned and designed to bolster the ecosystem for Manufacturers had to be delayed or expedited to meet the events ushered in by the Pandemic. The delivery of many initiatives also had to be transmitted via virtual platforms due to safety concerns which may have affected their impact and scope.

POLICY & PROGRAMMES

National Policy Framework

As the Ministry with primary responsibility for the Manufacturing industry, the Ministry of Industry, Investment and Commerce (MIIC), formerly The Ministry of Industry, Commerce, Agriculture & Fisheries (MICAF), and its agencies continued to play their roles in advancing Jamaica’s national growth agenda through its mandate to facilitate the development of manufacturing within an evolving global paradigm. The initiatives continued to be guided by the *Vision 2030 Jamaica – National Development Plan* and the associated *Medium-Term Socio-Economic Policy Framework (MTF) 2018-2021*, which provide the strategic roadmap for the government’s policies and programmes and the *Micro, Small & Medium Enterprise (MSME) and Entrepreneurship Policy (2018)*. The MSME and Entrepreneurship Policy also provided policy context given its focus on addressing several cross-cutting development issues for small business,

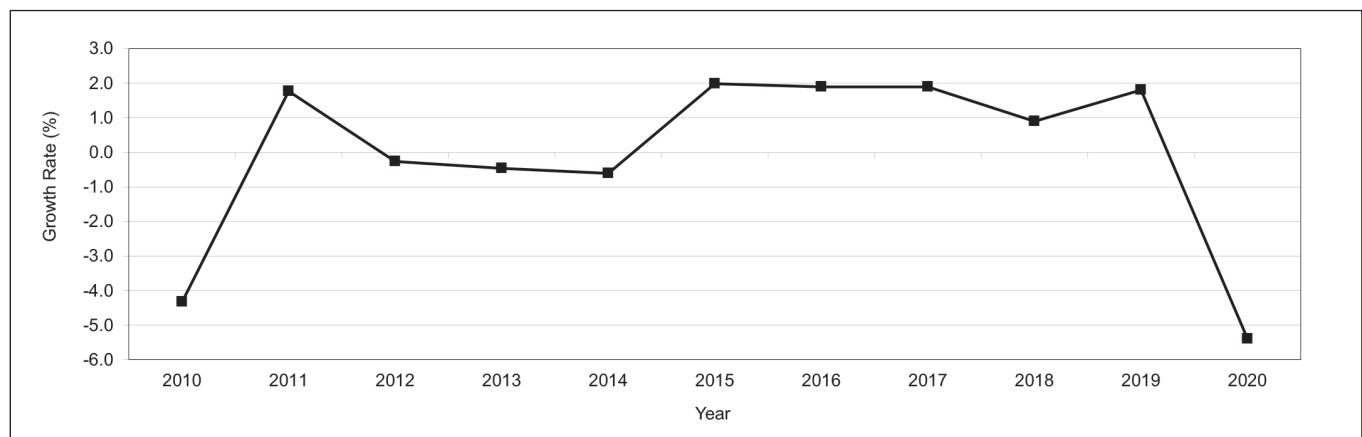


FIGURE 12A: CHANGE IN REAL VALUE ADDED FOR THE MANUFACTURING INDUSTRY, 2010-2020

which includes entities in the manufacturing sector. In addition, to strengthen the overall policy framework for manufacturers, approval was given for the National Five Year Manufacturing Growth Strategy to be expedited to provide more relevant and targeted intervention, to address longstanding issues which limit the sector and establish new opportunities to achieve greater productivity and output in the sector.

The updates on the status and progress of some policies and initiatives initiated prior to 2020 are shown in Box 12.1.

The following are some of the projects and work undertaken to bolster the manufacturing industry.

National Business Portal Project (NBP)

The NBP project intends to strengthen the enabling business environment for investors, both nationally and internationally. The project which is being spearheaded by JAMPRO, will complement and support the implementation of the National Investment Policy through the development of an online platform that will house the

Business-to-Government (B2G) online interface for all Government entities involved in the investment or business facilitation and incentive processing. It will provide information to potential investors on all aspects of doing business in Jamaica, including key Ministries, Departments and Agencies (MDAs), their respective processes, expected timelines and costs. The Portal will facilitate real-time tracking of applications throughout the various processes and the Information Technology (IT) infrastructure will also be designed to provide critical business analytics to inform policy and strategy to support investment.

The project is comprised of three phases. Phase I has been launched and houses the informational portal, which serves as the investment registration engine of the Portal and will feature a back-end discussion forum for Government partners to discuss the nuances of investment projects that have been submitted. Phase II has been successfully executed and covers the re-engineering and the identification of the functional and technical requirements for the main components of the Portal. Phase

BOX 12.1
UPDATE ON POLICIES AND PROGRAMMES IN THE MANUFACTURING INDUSTRY, 2020

Name	Description	Status
Export Max III	The Export Max initiative was officially launched in 2011 as a mechanism to assist Jamaican exporters and export-ready companies with capacity building and market penetration support	Due to the impact of the COVID-19, participants were given assistance in getting their companies to market via virtual trade shows and virtual B2B meeting platforms, engaging potential buyers, retailers and distributors. The 4 th phase of the programme is expected to be launched in 2022.
Manufacturing Five Year Growth Strategy	The Strategy is being developed to focus attention on the business environment necessary to grow and expand Jamaica's manufacturing industry and increase its contribution to GDP and the country's economic development objectives	In July Cabinet gave approval for the Strategy to be tabled in the Houses of Parliament. Subsequently, tabling in the House of Representatives was done in July and in the Senate in August. Planning for implementation of the Strategy has commenced.
Productive Inputs Relief (PIR) Facility (The Omnibus Fiscal Incentive Regime)	This was intended to lend support to the nation's productive sectors. The Productive Input Relief (PIR) Facility for manufacturing forms part of the legislation. The PIR allows eligible companies to receive specific incentives on imported goods, intended for direct use within their respective production processes	One hundred and eighty nine (189) applications were received, vetted and referred to the JCA. A total of 173 entities were approved for manufacturing status.
Jamaica Trade Information Portal (JTIP)	JTIP was officially launched in May 2019 and has been updated and monitored by the Trade Board Limited. The JTIP is a one-stop shop for all information relating to import and export and provides particulars on all regulatory requirements for traders to enable commercial and cross-border transactions	The Portal received 9 368 visitors, with a monthly user average of 780 visitors. Referrals accounted for 48.0 per cent. Direct access, 35.5 per cent and organic search and social media represent 15.0 per cent and 2.0 per cent, respectively.
The National Craft Policy	The policy seeks to create new opportunities for the maintenance of traditional knowledge and skill in craft and will complement the tourism product through improved quality and reliable supply chains of authentic Jamaican craft. By way of Cabinet Decision No. 39/17 dated October 17, 2017, MIIC was assigned portfolio responsibility for the National Craft Policy (NCP) as a framework to guide initiatives for the industry	The NCP was launched in July with the primary objectives of developing the institutional and governance structure of the craft industry, as well as strengthening linkages between the design/creative, agricultural, manufacturing, cultural, and tourism sectors. The JBDC is tasked with the daily implementation of the policy

III is pending and will include the design and construction of the IT solution required to effectively deliver the service.

New Customs Legislation

The Customs Act, 2020, will replace the current 1941 Act to modernise customs practices and procedures to effectively and efficiently facilitate trade. Cabinet granted approval for the re-tableing of the Bill in Parliament and the legislation was subsequently re-tabled in December. The new legislation is intended to promote socio-economic development and assist with the creation of conditions for economic growth. It is envisaged that the new legislation will *inter alia*:

- facilitate the efficient processing of customs-related transactions
- aid in protecting local business and the international supply chain from unfair international trading practices, smuggling of goods, under invoicing, fraud and intellectual rights infringement
- encourage voluntary compliance with customs laws and procedures
- support the implementation of Automated System for Customs Data (ASYCUDA) World
- improve and increase the collection of customs duties
- assist the Jamaica Customs Agency (JCA) in the processing of increased volumes of trade in an increasingly complex international trading environment.

Manufacturing & Export Growth Team

The Ministry increased its efforts to develop and implement targeted activities geared towards increasing exports. In this regard, the Ministry worked with the Manufacturing and Export Growth Team (MEGT) to drive the implementation of strategies to increase and diversify export products and markets as well as to mitigate systemic challenges which impact competitiveness of local exports. Work in this regard resulted in:

- removal of the Customs Administrative Fee (CAF) on export – The MEGT, made a submission to the Ministry of Finance and the Public Service to remove the CAF on export through e-commerce extension of the current truck appointment system
- truck appointment system – the Team advocated for an examination of the current opening hours at the ports to facilitate greater access by the goods producing sector. This resulted in considerations for extending the current truck appointment system for imports to exporters, to make the process of moving goods through the port system more convenient and efficient for exporters. This will become effective late February 2021.

In addition, a strategy to facilitate expansion into new non-traditional markets and the maximization of existing

market access opportunities through trade agreements was effected. The Ministry partnered with the JCA to utilize data from the ASYCUDA World platform to guide the target markets and products for export. Utilizing this approach data was used to:

- assess products currently being exported to markets with which Jamaica has trade agreements, identifying where volumes of these existing products can be increased and identifying companies currently engaged in these exports without utilizing trade agreements
- assess imports to those countries with which Jamaica has trade agreements to identify opportunities for Jamaican companies to supply the market.

There is also direct targeting of new ‘near-shore’ markets that could potentially demand Jamaican products. Related to this trade, profiles for the Cayman and Turks and Caicos islands were developed. Focus was also given to widening the export basket to include not just traditional export products, but also non-traditional products such as craft items and nutraceuticals.

Various initiatives were also executed through agencies and departments such as the Bureau of Standards Jamaica (BSJ), Jamaica Business Development Corporation (JBDC), Jamaica Intellectual Property Office (JIPO), Jamaica Promotions Corporation (JAMPRO) and the Cannabis Licensing Authority (CLA).

Jamaica Intellectual Property Office (JIPO)

The execution of the project “Support to JIPO for strengthening the intellectual property (IP) Ecosystem to increase innovation, competitiveness and growth in MSMEs in Jamaica” continued with support from the Inter-American Development Bank (IDB) and the Caribbean Development Bank (CDB). The project aims to create the conditions for IP commercialization and collateralization, that MSMEs can effectively leverage their IP assets, to obtain financing. This should increase competitiveness and foster innovation.

The Project consists of five (5) components:

- Component 1: Roadmap and Toolkit for Improving the IP Monetization Culture
- Component 2: Capacity Building in IP Valuation
- Component 3: Piloting IP Collateralization
- Component 4: Support for the Digitization of JIPO’s Administration of IPR
- Component 5: Project Management and Communications.

Contracts were issued for consultants in November for Components 1 and 2 while new consultants were selected for Component 3, and these project components commenced. Component 4 has continued consistently,

despite COVID-19. Two local consultants have been digitizing patent and design files and inputting the data into the Industrial Property Automated System (IPAS). Component 5 has advanced and members of the project steering committee were identified.

Bureau of Standards Jamaica (BSJ)

The establishment and achievement of standards remain one of the means by which firms can gain access to local and international markets and expand output and revenues to scale the business. The BSJ continues to play a pivotal role in this process by providing training, building awareness, providing technical assistance, forming partnerships and ensuring compliance.

A total of 63 standards were gazetted. Of the gazetted standards, there were 56 product standards and seven service standards primarily related to the food, electrical products, tourism, security resilience, customer contact centres and manufacturing. Of the standards gazetted, 53 were adoptions of international standards, one was a revision, seven were development standards and two were adoptions of regional standards. This brought the number of standards in the National Standards Catalogue to 620 as at end of December. The Bureau's initiatives also included:

Capacity Building – The BSJ presented 19 courses via 389 face-to-face and virtual training sessions which impacted 449 participants. These covered areas such as Good Manufacturing Practices, Enterprise Risk Management and Understanding & Interpreting ISO 900, among others.

Awareness Building – These initiatives included seminars and workshops on various quality and related issues. This included a seminar on the uses and benefits of bamboo leaves. There was also a webinar for Export Max III Programme beneficiaries on the theme “Prepare to Level Up” exclusively for processed food manufacturers. The BSJ committed to providing contributions totalling \$15.0 million over 3 years (this includes a monetary contribution of \$9.0 million and a non-monetary contribution of \$6.0 million) to Export Max. There were webinars, specifically targeted at food processors, on the amended food and nutrition regulation.

Business Development Support – Another three-year Memorandum of Understanding (MOU) was signed in July with the JBDC for the provision of technical support to MSMEs. A total of 34 clients referred by the JBDC were provided with discounts on selected products and service areas offered by the organization. In addition, 15 members of Jamaica Agro-Processors Association (JAPA) involved in agro-processing were provided with discounts on selected products and services. Additionally, the Memorandum of Agreement (MoA) between the BSJ and the Development Bank of Jamaica (DBJ) in support of its Voucher for Technical Assistance Programme was renewed in July.

The BSJ provided laboratory testing (microbiological, chemistry, calibration, scale testing, and label assessment), registration of establishment, training and sale of standards to 11 small business manufacturers from the food and cosmetics sectors. Technical information (information/advice) and training services were provided to 78 MSMEs.

Compliance to the US Food Safety Modernization Act (FSMA) – The BSJ continued to assist companies with preparing for Food and Drug Administration (FDA) inspections as it relates to Compliance to the US FSMA. Two visits were made and entities assisted with information on applicable aspects of the US market access requirements for processed food products, the *modus operandi* of FDA inspectors; the relevant inspection report forms used by the FDA, and the types of documentation/records that should be readily available.

Bamboo Products Sector – Development of the sector remained a priority. A total of 37 bamboo product producers were provided with technical guidance in product development and 25 persons have been trained in using a computer-aided machine to produce bamboo craft (clocks, combs, neckties, baskets and personalised gift items).

Cannabis Licensing Authority

Cannabis Sector Development

Investments in the local cannabis sector continues despite the ongoing challenge in banking and national and international regulations. The United Nations Commission on Narcotic Drugs voted to remove cannabis from Schedule IV of the 1961 Single Convention on Narcotics Drugs. It is anticipated that the de-scheduling of cannabis should provide reassurance to the banking community, as they seek to offer financial services to cannabis businesses.

The sector was impacted by the COVID-19 pandemic which resulted in a general slowdown of applications for licenses. However, a total of 13 licences were issued by the Cannabis Licensing Authority (CLA) which is 59.0 per cent of the number initially targeted. The CLA has issued a total of 75 licences since 2016.

Other developments included the creation of protocols to allow the export of cannabis on a case by case basis for purposes of testing and research to facilitate the sector. Drafting instructions were issued to the Chief Parliamentary Counsel for the preparation of Regulations to govern the hemp sector. This activity will continue into the new Financial Year 2021/22.

Jamaica Business Development Corporation (JBDC)

The Corporation is the entity tasked with leading the expansion of the Small Business Development Centres Network in Jamaica and since April 2019, a total of 13

Small Business Development Centres have been established to provide access to its services. Of the overall number of clients who accessed JBDC services during the period, 14.0 per cent were from the manufacturing and production sector. The JBDC served 1 657 clients from the MSME sector during the year. As the restrictions on businesses and stay-at-home orders to curtail the spread of COVID-19 negatively impacted financial activities of businesses, the JBDC strived to provide various opportunities for growth to its clients, these include:

Capacity Building

Opportunities were provided to MSMEs to improve their capacities and competencies through the delivery of 94 virtual webinars, trainings and seminars benefiting over 5 618 persons. All initiatives were geared towards providing business, technical and market access support services and information. Services included business consultation, training activities, incubator services, market access, product development, graphic design services, monitoring (business and product development), product screening and facility audits, research and project management.

Virtual Biz Zone

With the cancellation of its Small Business Expo and Conference in 2020 due to the COVID-19 pandemic a weekly webinar series dubbed JBDC Virtual Biz Zone was launched in June to stay connected with clients and team during the pandemic. The webinars were delivered by the JBDC's practitioners, and select partners from other public and private sector entities. There was also the hosting of Virtual Gift and Craft Biz Zone.

Employee Engagement Seminar 2020

The inaugural staging of the Employee Engagement Seminar 2020 Virtual Series was hosted in October and featured international, regional and local speakers. The Seminar is an outgrowth of the Employee Engagement Conference and sought to help leaders and entrepreneurs to:

- gain employees' solid commitment to their organisation's goals, culture and brand
- develop employees who consistently go the extra mile to produce results in the special circumstances resulting from the COVID-19 pandemic.
- be empowered to create and implement the ultimate employee experience through strategy execution.

Global Entrepreneurial Week (GEW) 2020

A week of activities was hosted during Global Entrepreneurship Week in November under the theme: "Ideate. Innovate. Activate." Activities included a Virtual

Biz Zone – The Design Act 2020 (JIPO); Virtual Biz Zone – The Patent Act 2020 (JIPO); Brand Jamaica Design Lab; and the Building Opportunities for Sweet Success – B.O.S.S MAN/B.O.S.S. LADY of the year awards.

Proposal Writing Intervention

Entrepreneurs also benefited from a Social Return on Investment (SROI) Virtual Round-Table and Grant Fund Proposal Writing Workshop for Social Enterprises (SEs). The virtual round-table was focused on examining the progress of SEs shifting from subsistence models towards high growth models while the workshop focused on developing SEs ability to achieve growth through accessing grant funding. The focus areas included helping entrepreneurs to:

- construct strategic proposals to access grant funding for start-up activities and developmental projects
- understand the dynamics of grant fund proposal writing from local and international donor's perspective
- identify local and international sources of grant funding for social enterprises
- navigate the due diligence requirements of donors.

An outcome of the training was a Pitch Session competition with the winner receiving grant funding to undertake project activities.

Memorandum of Understanding (MOU) – CIAL Dun and Bradstreet

An MOU was signed with international organisation, CIAL Dun and Bradstreet, to deliver critical development services to MSMEs. CIAL Dun and Bradstreet empowers companies of all sizes to grow, manage their customers and suppliers and operate successfully in an increasingly global, transparent and modern economy. The organization also offers tools such as business ID, digital badge, and business analysis report.

JAMPRO – Investments Facilitation

JAMPRO reported that in light of the obstacles that emerged due to the COVID-19 pandemic the focus was on promoting local direct investment (LDIs) opportunities and supporting local investors in the beginning of projects. Of note was the two multi-billion dollar investment into the local poultry sector. This involved the expansion and modernisation of processing facilities. These investments created direct job opportunities as well as indirect ones, through the operations of contract farmers who in turn would have had to implement expansions to meet the demand of the processors. Additionally, market penetration support was provided to a number of MSMEs. The expansion and retrofitting of operations and the upgrading of facilities to meet global quality standards was also facilitated.

Although the manufacturing industry contracted in output, some manufacturers were able to cease the opportunity and expand their market. This was primarily evident for manufacturers in the chemicals and cosmetics industries which encountered new opportunities for increased production and sale of products such as hand sanitizers, rubbing alcohol, hydrogen peroxide, pharmaceuticals, masks, paper towels and household and industrial cleaning chemicals.

JAMPRO noted that initiatives also focused on boosting manufacturing investment and export promotion. This included the engagement and leveraging of online platforms for B2B meetings between manufacturers and international buyers, utilizing E-commerce facilities, and implementing virtual trade missions to introduce more international buyers to Jamaica's export products. These activities were supported by market intelligence webinars to prepare manufacturers to enter new export markets.

The Government of Jamaica (GOJ) had adjusted its approach to various initiatives and activities in light of the COVID-19 pandemic, a few are outlined in Box 12.2.

Jamaica Manufacturers and Exporters Association (JMEA)

Operational adjustments and declines in revenue and exports were a few of the challenges members of JMEA reported, as the COVID-19 pandemic impacted the country. In view of this the JMEA focussed its efforts on market penetration and capacity building to renew and re-energize Jamaica's manufacturing sector.

Members benefited from training and workshops on market intelligence that taught exporters how to use market analysis tools to identify the most appropriate target market for their products and services. There was also the creation of *Big Brother Big Sister Alliance for Export Growth* (BBBSAEG) Programme to connect successful and mature exporters with new and small and medium sized (SMS) exporters so that the veteran exporter could assist the small and medium size exporter to increase their capability for export success. Webinars were hosted on *Building Businesses During and After COVID-19* that provided information, case studies and expert advice to help the leaders build their businesses during and after COVID-19. There was also a seminar on *Mitigating the Economic Impact of COVID-19 On Manufacturers And Exporters* which focused on the process to tighten cost control, a framework to reverse losses and preparing a checklist to measure and strengthen business resilience and using a scalable template to optimize prices and product mix.

Another strategy used to broaden resources available to manufactures and exporters was the renewal and establishment of partnerships. Members were slated to

benefit from an MOU with the Caribbean Chamber of Commerce in Europe signed in November. This was aimed to boost exports for the European market through cooperation in market information and intelligence, technical assistance and support, training and capacity building and training development & business matchmaking.

The 6th staging of the Tourism Linkages Network (TLN) *Christmas in July* was held in partnership with JAMPRO and the JBDC in July. More than 100 micro and small enterprises participated in the event which was held virtually. Approximately 59.0 per cent of the applicants were new to the event.

Special marketing and promotional activities for manufacturers included the National Manufacturers' Month which was observed in October. The association collaborated with various entities to host virtual activities during the month to encourage the strengthening of the Jamaican economy by renewing and reenergizing the manufacturing industry. Activities included a Customer Service Workshop in partnership with the Jamaica Customer Service Association (JaCSA), *Innah Di Factory Virtual Tour*- (Four tours were executed); *What's On the Shelf Series* – Virtual promotion of locally manufactured products; and Manufacturing Matters Series, *ManuFacts* and other manufacturing related content.

With the COVID-19 pandemic and the measures implemented by the government to mitigate the spread of the virus, the JMEA surveyed its members to assess the impact. The survey revealed that approximately 50.0 per cent of its membership had seen a decrease in demand in the fourth quarter relative to the first quarter of 2020. Approximately one third saw an increase in demand while the remainder reported that demand remained stable.

As it relates to sales revenue, 62.2 per cent of its respondents reported a decline in the fourth quarter relative to the first quarter. Approximately 20.0 per cent reported increased sales revenues while the remainder reported having stable sales revenue.

The impact of the COVID-19 pandemic on exports was also assessed and the survey showed that 22.3 per cent of the members surveyed saw an increase in exports in the fourth quarter relative to first quarter. Stable exports was reported by 6.7 per cent of members. This was however, 35.5 percentage points lower than the number of members who reported stable exports in the first quarter.

By December, 48.9 per cent of members were experiencing supply disruptions in purchasing input for production due to the COVID-19 pandemic, while 51.1 per cent of those surveyed indicated that they were not facing supply disruptions.

BOX 12.2
MEASURES TAKEN TO REVIVE ECONOMIC ACTIVITY IN THE INDUSTRY, 2020

Activities	Impact	Measures
Stakeholder Engagement with key players	Growing perception that Business confidence would decline thereby significantly, impact food supply	<ul style="list-style-type: none"> Discussions were held in March with the business sector and other key stakeholders. The discussions were geared at ensuring action, as needed, could be taken to secure the food supply and shore-up business confidence that the government remained open to supporting businesses throughout the crisis period.
Business Facilitation	Investment in manufacturing production maintained.	<ul style="list-style-type: none"> Bolstering of the Productive Input Relief (PIR) for manufacturers continued with adjustments made to the treatment of site visits for re-verification of manufacturing status. Extension of permits for six months pending the conduct of site visits during the COVID-19 outbreak. New applications were treated according to established processes with restrictions on performing site visits for entities located within designated quarantine zones. Video site visits were adopted as a strategy to facilitate the issuance of PIR letters.
Trade Facilitation and Export Expansion	The usual standard operating procedures for the Trade Board Limited proved to be very inhibiting for customers/stakeholders. Therefore new procedures were facilitated to enable business continuity.	<ul style="list-style-type: none"> Export certification - TBL introduced an online platform to facilitate processing of CARICOM Certificates of Origin Export licensing – e-mails were used to facilitate the issuance of export licenses. A protocol was established for re-certification of new and used motor vehicle dealers and Type I/Type II scrap metal functionalities Continued implementation of Jamaica Single Window for Trade (JSWIFT)
Enabling Business Environment	Price Gouging - Prices on cleaning items saw exorbitant increases in March post the announcement of Jamaica's first COVID-19 case	<ul style="list-style-type: none"> The Consumer Affairs Commission (CAC) ramped up surveillance at points of sale of cleaning and sanitation items. The Ministry spearheaded the introduction of the Trade (Sale of Goods during the Period of Declaration of Disaster Area) Order, 2020 to stem the practice of price gouging. The CAC will pursue legislative amendment of the Consumer Protection Act to ensure a permanent empowerment to investigate and prosecute cases of price gouging and other such offences in times of disaster.
Increased Inspection and Surveillance	Poor Quality sanitizers offered on the market - Certain brands were misrepresenting the alcohol and active ingredient contents.	<ul style="list-style-type: none"> The National Compliance and Regulatory Authority (NCRA) investigated and increased surveillance in the market to ensure that consumers are not getting substandard goods.
Development of Local Sanitizer and Mask Manufacturing	Bolstering the supply of personal protective equipment including sanitizers and masks	<ul style="list-style-type: none"> Immediate action taken: MOFPS allowed duty free import of hand sanitizer to ensure adequate supplies were available in the initial stages of the COVID-19 outbreak. This was continued to December. BSJ developed standards for sanitizer and masks production to guide the local manufacturing process. Increase in local production of PPE and sanitizers expanded rapidly while new export markets were developed – toilet paper industry production.
Support of the Medical Cannabis Industry	Reduction in cannabis sales Collation of data for international reporting maintained Reduction in trade in the cannabis industry	<ul style="list-style-type: none"> The Cannabis Licensing Authority (CLA) facilitated the industry by allowing Licensees to utilize online sale and curb-side pick-up of medicinal cannabis. Online sale continues to date. Remote Monitoring/Video Recordings used by the CLA in enforcement and monitoring activities. Introduction of virtual signature of Tripartite Agreements to facilitate trade/sale of cannabis by cultivators.

BUSINESS CONFIDENCE AND CONSUMER CONFIDENCE

Business Confidence

The Business Confidence index recorded a 23.1 points decrease to an average of 120.5 points compared with 2019. This was the culmination of declines for each of the four quarters relative to 2019. This decline in confidence

was due to reductions in the sub-indices Current Business Conditions down 43.2 points to 124.7 points and the Index of Business Expectation down 29.7 points to 118.9 points.

The downturn in sub-index components Current Return on Investments and Investment Expansion Climate to an average of 72.5 and 102.3 points, respectively led to the performance of Current Business

Conditions sub-index. The sub-index Index of Business Expectation was impacted by a decline in the components Expected Change in the Economy down 16.5 points to 133.5 points, Expected Change in Firms Finances down 17.8 points to 149.5 points and Expected Changes in Profitability down 20.2 points to 138.3 points.

Consumer Confidence

The survey of consumer confidence showed an average decline of 30.1 points to 150.1 points relative to 2019. This was the combined effect of a 64.2 points decline to an average of 154.5 points for the sub-indices Current Economic Conditions and an 18.8 points decline to an average 148.6 points in the Index of Consumer Expectation.

A less optimistic outlook for the Current Business Conditions and Current Job Prospects sub-index components resulted in the lower expression of confidence in the Current Economic Conditions sub-index. The components Expected Business Conditions, Expected Job prospects and Expected Change in Income all registered downward movements relative to 2019 which resulted in the lower confidence registered for the Index of Consumer Expectation.

PERFORMANCE

Production

RVA for the Manufacturing industry was estimated to have contracted by 5.4 per cent compared with 2019. This resulted from lower output from the *Food, Beverages & Tobacco* and *Other Manufacturing* sub-industries. The lower out-turn for *Food, Beverages & Tobacco* was supported by a sample survey which showed decreased output of Poultry Meat (8.0 per cent to 122 845 tonnes), Animal Feeds (5.8 per cent to 443 647 tonnes), Sugar (27.0 per cent to 44 824 tonnes), Molasses (34.2 per cent to 24 594 tonnes), Dairy Products (18.3 per cent to 3 697 tonnes) and Carbonated Beverages (2.6 per cent to 17 476 859 cases). However, a further contraction was tempered by greater production of Cornmeal, Condensed Milk and Rum & Alcohol (Table 12.1).

The overall performance of the *Food, Beverages & Tobacco* sub-industry was negatively impacted by a decline in total employment and factory closures. This resulted from measures to curtail the spread of COVID-19 that impacted demand and reduced operational hours that

resulted in lower production volumes. Also notable was the closure of the Golden Grove sugar factory in St Thomas.

The contraction in the *Other Manufacturing* sub-industry reflected lower production of *Petroleum Products* and *Paper and Paper Products*. The output of *Chemicals & Chemical Products* and *Non-Metallic Minerals* grew compared with 2019 and prevented a further contraction.

All product categories within *Petroleum Products*, with the exception of Automotive Diesel Oil, decreased compared with 2019. The largest declines were registered for Turbo Fuel (37.5 per cent to 48 240 litres), Other Petroleum Products (44.6 per cent to 11 359 litres), and LPG (19.2 per cent to 16 919 litres). A contributing factor to this out-turn was the fall in the refinery service factor during the months of July and August when the refinery operated at 32.6 per cent and 16.5 per cent, respectively, of its capacity. Additionally, the increase in the number of persons working from home, as well as curfew, led to a reduction in demand for petroleum products. The production of *Rubber & Plastic Products* also declined. This primarily reflected a fall-off in output of *Other Plastic Products* category.

There was increased production of Cement by 23.9 per cent to 940 003 tonnes and Clinker by 13.8 per cent to 731 471 tonnes. This drove the growth of the *Non-Metallic Minerals* sub-industry. Output of the heavier weighted Cement increased for all quarters of relative to 2019 and was driven by increased demand. There was also greater output of *Chemicals & Chemical Products* compared with 2019 supported by increased production of Fertiliser.

Producer Price Index¹ (PPI)

Producer prices within the manufacturing industry increased by 1.1 per cent for 2020. The index showed that increases were registered for all major group indices except Refined Petroleum Products which went down by 10.4 per cent. Major groups recording increases were:

- Wood, Wood Products and Furniture up 12.9 per cent
- Other Manufacturing n.e.c. up 7.0 per cent²
- Food, Beverages & Tobacco up 4.0 per cent
- Textile Apparel and Leather Products up 3.9 per cent.

All groups within the major group, Food, Beverages & Tobacco, registered increases as well as all sub-groups. The largest movement in the indices were for Seasoning, Spices, Sauces and Condiment, up 6.3 per cent and Sugar, Cocoa, Coffee, Chocolate & Sugar Confectionery up 5.3 per cent.

1. The Producer Price Index is a measure of the average change in the price of goods and services either as they leave the place of production or as they enter the production process. This index is based on either output or input prices. Producer Price is the total received by the producer from the purchaser for a unit of good or service produced as output. It excludes all deductible taxes, suppliers' retail and wholesale margins and separately invoiced transport and insurance charges.

2. Not Elsewhere Classified (n.e.c)

TABLE 12.1
OUTPUT OF SELECTED MANUFACTURED COMMODITIES, 2016–2020

	UNIT	2011	2016	2017	2018	2019 ^r	2020 ^p	2019 ^r / 2018	2020/ 2019
FOOD BEVERAGES & TOBACCO									
Food Processing									
Poultry Meat	tonnes	101 165	125 171	127 637	131 442	133 466	122 845	1.5	-8
Animal Feeds	tonnes	402 201	461 269	491 281	479 806	470 786	443 647	-1.9	-5.8
Condensed Milk	tonnes	10 293	n/a	5 928	6 144	7 527	7 542	22.5	0.2
Edible Oils	tonnes	21 266	22 435	24 232	23 228	22 504	22 512	-3.1	0
Edible Fats	tonnes	7 047	4 440	5 286	5 183	5 507	5 365	6.2	-2.6
Flour	tonnes	134 510	98 339	129 896	100 349	96 925	n/a	-3.4	n/a
Cornmeal	tonnes	5 128	8 106	7 318	8 581	7 978	9 350	-7	17.2
Sugar	tonnes	143 195	86 062	86 845	80 106	61 404	44 824	-23.3	-27
Molasses	tonnes	63 664	54 207	54 450	42 686	37 360	24 594	-12.5	-34.2
Dairy Products	tonnes	3 864	4 173	4 181	4 201	4 524	3 697	7.7	-18.3
Bakery Products	000	n/a	43 479	43 666	44 560	45 676	48 095	2.5	5.3
Beverages & Tobacco									
Alcohol (incl. rum)	'000 ltrs	19 367	17 332	16 197	19 103	16 463	19 336	-13.8	17.4
Beer & Stout	'000 ltrs	58 343	55 457	69 406	67 594	60 700	n/a	-10.2	n/a
Beer	'000 ltrs	46 400	34 925	48 563	47 351	42 973	23 837	-9.2	-44.5
Stout	'000 ltrs	11 943	20 532	20 843	20 243	17 727	9 195	-12.4	-48.1
Carbonated Beverages	000 cases	11 101	15 776	17 107	17 420	17 946	17 477	3	-2.6
OTHER MANUFACTURING									
Chemicals & Chemical Products									
Acetylene	cu.mtrs	89 093	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Sulphuric Acid	tonnes	6 928	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Aluminium Sulphate	tonnes	6 920	1 479	1 794	1 586	1 844	1 422	16.2	-22.9
Sulphonic Acid	tonnes	4 381	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Salt (Nacl)	tonnes	14 001	15 354	14 418	15 570	16 054	12 770	3.1	-20.5
Fertiliser	tonnes	33 286	18 548	24 354	28 542	21 670	23 533	-24.1	8.6
Detergent	tonnes	367	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Paint	'000 ltrs	9 765	9 949	10 454	10 818	12 471	n/a	15.3	n/a
Petroleum Products									
Gasolene	'000 ltrs	194 325	160 754	172 279	161 892	194 592	176 872	20.2	-9.1
LPG	'000 ltrs	19 606	16 607	23 421	19 570	20 938	16 919	7.0	-19.2
Fuel Oil	'000 ltrs	767 273	713 300	712 890	749 868	897 378	797 127	19.7	-11.2
Turbo Fuel	'000 ltrs	114 771	91 001	68 069	90 078	77 238	48 240	-14.3	-37.5
Automotive Diesel Oil	'000 ltrs	220 549	133 956	108 798	120 865	155 248	217 541	28.4	40.1
Other Petroleum Products	'000 ltrs	46 263	39 284	36 206	24 715	20 496	11 359	-17.1	-44.6
Non Metallic Minerals									
Cement	tonnes	766 274	910 263	845 932	787 413	758 828	940 003	-3.6	23.9
Clinker	tonnes	n/a	762 665	691 589	612 988	642 946	731 471	4.9	13.8
Plastic Products									
Other Plastic Products - a	tonnes	10 663	14 112	14 993	15 525	11 932	4 827	-23.1	-59.5

a – includes PET bottles

r – revised

p – preliminary

n/a – not available

Source: Survey conducted by the PIOJ

Exports

Exports earnings saw a double digit decrease of 10.9 per cent compared with 2019. This was the outcome of lower earnings for Traditional Exports and Non-Traditional Exports which declined by 9.6 per cent and 11.1 per cent, respectively (Table 12.2).

The decreased export earnings from Traditional Exports resulted from declined earnings for all the components reviewed. The products with the largest percentage changes were Sugar which contracted by 36.1 per cent to US\$6.5 million and Other Products down 33.6 per cent to US\$3.3 million. Rum exports earnings accounted for 85.7 per cent of traditional export earnings but contracted by 2.6 per cent.

Although Non-Traditional Exports saw increased earnings for Processed Foods; Beverages & Tobacco (excluding Rum), Animal & Vegetable Oils & Fats, and Other, this was not suffice to outweigh the contraction

induced by the lower production of the other components. Crude Materials decreased by 15.5 per cent to \$US16.6 million, Mineral Fuels, etcetera down 25.9 per cent to US\$220.3 million; Chemicals (including Ethanol), down 5.5 per cent to US\$29.8 million; Manufactured Goods down 17.8 per cent to US\$7.1 million and Machinery & Transport Equipment by 55.2 per cent to US\$2.6 million. These directed the performance of Non-Traditional Exports earnings (see Table 12.2).

Employment³

In comparison with 2019, the average number of employed⁴ persons in the industry declined by 6.5 per cent to 72 500 persons and reflected contractions in the number of employed males by 5.3 per cent to 50 133 and females by 9.0 per cent to 22 367. The manufacturing industry's share of the employed labour force remained relatively

TABLE 12.2
TOTAL EXPORTS FROM THE MANUFACTURING INDUSTRY, 2016–2020
(US\$000)

	2016	2017	2018	2019 ^r	2020 ^p	% Change 2020/2019
TRADITIONAL						
Sugar	14 166	14 362	15 970	10 174	6 500	-36.1
Other Products	3 380	4 967	4 138	5 032	3 343	-33.6
Rum	39 612	41 099	45 799	55 976	54 497	-2.6
TOTAL TRADITIONAL EXPORTS	57 158	60 428	65 907	71 182	64 340	-9.6
NON-TRADITIONAL						
Processed Foods	134 812	142 214	137 683	147 051	162 823	10.7
Beverages & Tobacco (excluding Rum)	49 161	70 117	66 548	72 148	73 440	1.8
Crude Materials	20 093	24 452	23 276	19 713	16 651	-15.5
Mineral Fuels, etcetera	172 672	233 334	279 095	297 071	220 260	-25.9
Animal & Vegetable Oils & Fats	272	294	348	291	343	17.9
Chemicals (including Ethanol)	25 963	24 190	38 162	31 624	29 886	-5.5
Manufactured Goods	15 772	10 974	6 313	8 602	7 071	-17.8
Machinery & Transport Equipment	3 021	2 540	1 799	5 756	2 576	-55.2
Other ^a	7 952	7 151	6 468	5 999	10 140	69.0
TOTAL NON-TRADITIONAL EXPORTS	429 718	515 266	559 692	588 255	523 190	-11.1
TOTAL EXPORTS	486 876	575 694	625 599	659 437	587 530	-10.9

Discrepancies due to rounding

a – includes Wearing Apparel, Furniture and Other Domestic Exports

r – revised

p – preliminary

Source: Compiled from data supplied by STATIN

- The average employment represents a simple average of the industry employment level, using the quarterly labour force surveys undertaken by the Statistical Institute of Jamaica during the year.
- Average Employment represents data for January, July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for January, July and October.

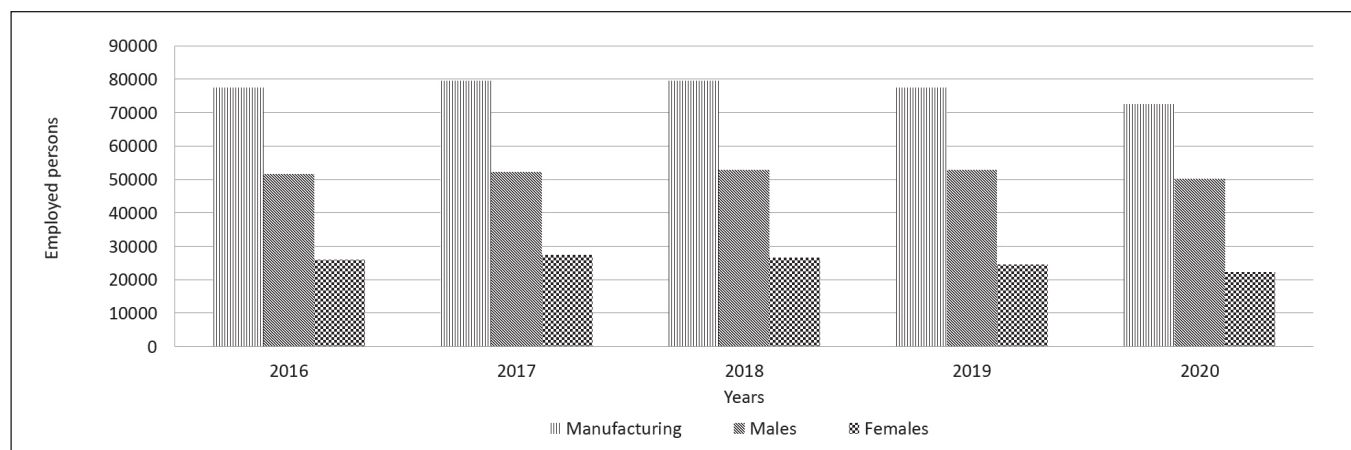


FIGURE 12B: EMPLOYED LABOUR FORCE IN THE MANUFACTURING INDUSTRY, 2016–2020

unchanged at 6.2 per cent despite a 5.2 per cent decline in the total employed labour force. Output per worker at constant 2007 prices was \$879 890. The sex employment distribution continued to be skewed towards males as they accounted for 69.1 per cent of employment while females accounted for 30.9 per cent (Figure 12B).

Financing to the Industry

As at the end of December the stock of outstanding Loans & Advances at commercial banks to the Manufacturing industry stood at \$37 845.6 million compared with \$32 709.2 million at the end of 2019. Food, Drink, & Tobacco and Other combined, accounted for more than 60.0 per cent of the loans and advances to the industry. The increase compared with the end of 2019 was

pushed by greater loans and advances to the following:

- Sugar, Rum & Molasses by 62.0 per cent to \$3 327.9 million
- Food, Drink, & Tobacco by 23.0 per cent to \$14 311.6 million
- Cement & Clay Products by 12.3 per cent to \$1 457.5 million
- Other by 17.1 per cent to \$11 421.7.

At the end of December Loans & Advances outstanding at Institutions Licensed under the Financial Institutions Act (FIA) to the Manufacturing industry was \$128.3 million compared with \$196.0 million at the end of 2019. Loans and advances to the Manufacturing industry accounted for 7.8 per cent of loans disbursed by institutions licensed under the FIA compared with 12.3 per cent in 2019.

TABLE 12.3
OUTSTANDING LOANS AND ADVANCES TO THE MANUFACTURING INDUSTRY BY COMMERCIAL BANKS, 2016–2020
((\$'000))

Categories	2016	2017	2018	2019	2020	Absolute 2019 2018	Absolute 2020 2019	2020/ 2019
Sugar, Rum & Molasses	8 403	3 901	131 772	2 054 866	3 327 968	1 923 094	1 273 102	62.0
Food, Drink, & Tobacco	9 098 375	9 252 519	10 680 906	11 634 082	14 311 631	953 176	2 677 549	23.0
Paper, Printing & Publishing	908 447	753 351	938 120	994 760	1 023 732	56 640	28 972	2.9
Textile, Leather & Footwear	276 156	389 770	426 568	604 893	504 229	178 325	-100 664	-16.6
Furniture, Fixture & Wood Products	558 810	509 876	478 470	743 035	572 828	264 565	-170 207	-22.9
Metal Products	191 344	3 943 761	3 716 860	3 625 236	3 299 677	-91 624	-325 559	-9.0
Cement & Clay Products	263 780	629 395	4 134 737	1 297 840	1 457 545	-2 836 897	159 705	12.3
Chemicals & Chemical Products	1 566 179	1 568 847	1 582 238	1 996 950	1 926 310	414 712	-70 640	-3.5
Other	4 744 030	5 336 417	8 219 606	9 757 577	11 421 684	1 537 971	1 664 107	17.1
Total	17 615 524	22 387 837	30 309 277	32 709 239	37 845 604	2 399 962	5 136 365	15.7

Source: Compiled by the PIOJ from data supplied by the BOJ

TABLE 12.4
CHANGE IN SALES FOR MANUFACTURED GOODS 2019, 2020
(\$MILLION)

	2019 ^r	2020 ^p	Nominal Change %	Real Change %
Food, Beverages & Tobacco	201 119.0	193 401.1	-3.8	-7.3
Textiles & Wearing Apparel	6 259.7	4 609.9	-26.4	-28.5
Leather, Leather Products & Footwear	599.1	473.2	-21	-23.3
Paper & Paper Products, Printing & Publishing	16 881.0	14 237.8	-15.7	-18.1
Refined Petroleum Products	689.4	742.5	7.7	22.2
Chemicals, Chemical Products, Rubber & Plastic Products	76 705.2	67 376.7	-12.2	-79.1
Non-Metallic Mineral Products	21 574.8	23 893.9	10.7	10.6
Metals, Fabricated Metal Products; Machinery & Equipment	18 257.6	17 369.1	-4.9	-6.4
Furniture & Products of Wood, Cork & Straw	8 104.1	7 903.9	-2.5	-10.2
Other Manufactured Goods	32 694.5	35 570.2	8.8	0.2

Discrepancies due to rounding

Source: Compiled by the PIOJ using preliminary GCT data from Tax Administration Jamaica

REAL SALES BY MANUFACTURERS

An assessment of sales by manufacturers using preliminary GCT data showed a decline in real sales compared with 2019.⁵ All product categories, with the exception of Refined Petroleum Products, Non-Metallic Mineral Products and Other Manufactured Goods, registered lower real sales compared with 2019. Food, Beverages & Tobacco; Chemicals, Chemical Products, Rubber & Plastic Products; and Metals, Fabricated Metal Products, Machinery & Equipment; recorded declines in sales but accounted for the largest portion of real sales representing 52.9 per, 18.4 per cent and 6.5 per cent, respectively of real sales (Table 12.4).

OUTLOOK

The Manufacturing industry is expected to grow for 2021, albeit it is anticipated that the COVID-19 pandemic and measures implemented to curtail its spread will continue to impact the economy and the manufacturing industry. A gradual recovery in employment and further opening up of the economy in late 2021 is expected to positively impact demand and supply of manufacturing goods. It is also expected that firms have had the time to pivot and identify new opportunities and markets will expand.

It is expected that programmes and initiatives that had been delayed or reduced in scope from both the public and private sectors, will be continued in 2021 and help to bolster the business environment for manufacturers.

As it relates to the GOJ, the MIIC will be focused on the following in Financial Year 2021/22:

- implementation of the National Five Year Manufacturing Growth Strategy
- continued implementation of the National Craft Policy
- facilitating greater access to the Productive Input Relief incentive for manufacturing
- expansion of the Cannabis Alternative Development Programme
- implementation of the Cannabis Transitional Permit to increase access by small farmers to the regulated industry
- Completion of the regulations to facilitate the import and export of cannabis
- facilitating the expansion of the bamboo industry through the following projects
 - manufacture of bamboo mat boards for export
 - implementation of the bamboo in construction research project – in collaboration with the Bureau of Standards Jamaica
 - manufacture of bamboo paper products ■

5. Nominal figures are deflated by the Manufacturing's Producer Price Index to calculate the real percentage change

MICRO AND SMALL ENTERPRISES

INTRODUCTION

The continued support for Micro, Small and Medium Enterprises (MSMEs) remains a priority on the Government of Jamaica's (GoJ) policy agenda. The focus being on introducing policies and programmes to enhance the competitiveness, innovation, and internationalization of these enterprises. The developments in the sector continued to be guided by the MSME and *Entrepreneurship Policy* and the *Vision 2030 Jamaica – National Development Plan* and the associated *Medium-Term Socio-Economic Policy Framework (MTF) 2018-2021*.

As it relate to performance, the contribution of MSME to the economy continued to be mainly in the area of employment, particularly Own Account Workers, which accounted for the second largest portion of the employed labour force. However, as one of the more vulnerable types of firms in the economy, the negative impact of the Coronavirus Disease 2019 (COVID-19) was especially felt by these enterprises as reflected in the declines in sales and number of registered MSMEs that filed General Consumption Tax (GCT) returns. Additionally, financing being identified as one of the main challenges faced by MSMEs, also declined relative to 2019, exacerbating the difficulties faced by these enterprises. As gleaned from one study, *Assessing the Impact of the COVID-19 Pandemic on Jamaican Businesses (with an emphasis on MSMEs)*, financing remained a challenge, with firms seemingly not opting to utilize some sources of financing and financiers possibly hesitant to lend. This was due to the seemingly higher risk of non-repayment caused by the impact of the pandemic. The largest number of MSMEs continue to operate within the Wholesale and Retail Trade and Repair of Motor Vehicles category, followed closely by Real Estate, Renting & Business Activities.

Those developments were also reflected in the lower levels of confidence expressed by businesses and consumers in the economy. The surveys of Business Confidence and Consumer Confidence revealed that businesses and consumers were showing less optimism for present and future economic conditions.

POLICIES & PROGRAMMES

The GoJ primarily through the Ministry of Industry, Investment and Commerce (MIIC), formerly the Ministry of Industry, Commerce, Agriculture & Fisheries (MICAF) continued to implement policies and drive initiatives to bolster the performance and development of the MSMEs. These efforts were supported by other Ministries, Departments and Agencies (MDAs) as well as the private sector.

MSME and Entrepreneurship Policy Implementation

The Ministry completed 29 months of the five-year implementation of the MSME and Entrepreneurship Policy. Of the 193 policy activities to be implemented over the five-year period, the Ministry had an active portfolio combination of 130 short, medium, and long-term activities under implementation. Of this total, 78 activities had been fully implemented, with the remaining 52 activities in the active portfolio at various stages of completion.

The MSME and Entrepreneurship Policy implementation activities are being overseen by a National Policy Implementation Committee, with representatives from the private sector and relevant MDAs. The oversight body meets quarterly and is supported by four working groups. The working groups and their respective chairs are as follows:

- Business Development and Capacity Building, {Jamaica Business Development Corporation (JBDC)}
- Social Enterprise Development, {Planning Institute of Jamaica (PIO)}
- Business Enabling Environment, {Jamaica Chamber of Commerce (JCC)}
- MSME Finance & Agriculture Finance (structured within the framework of the National Financial Inclusion Strategy), {Development Bank of Jamaica (DBJ)}.

Public Procurement Regulations

The development of the Public Procurement regulations in 2018, and the promulgation of two Ministerial Orders in 2020 provided for special and differential treatment for MSMEs and local industries to increase their participation in public procurement opportunities. With these in place, the MIIC partnered with the Ministry of Finance

and the Public Service to implement a one-year pilot project involving six MDAs to operationalize the *20.0 per cent Set Aside Regime for MSMEs*. This allows MSMEs to access a percentage of government contracts under the public procurement Set Aside Order. The pilot was intended to expedite the prioritization and promotion of public procurement opportunities up to \$15.0 million specifically targeting MSMEs. The ultimate aim of the pilot was to generate lessons learnt with a view to refining the operational guidelines for a full roll-out of the Orders among all MDAs in fiscal year 2021/2022.

Development of the Social Enterprises (SE)

Sub-Sector

The policy goals of the updated MSME Entrepreneurship Policy 2018 emphasized the development of the SE sub-sector. The PIOJ working through the Community Renewal Program (CRP) chaired a Social Enterprise Working Group (SEWG) consisting of various stakeholders within the SE sub-sector. The SEWG developed and completed a Concept Note which provided insights and justification for the development of a Social Enterprise Legal Status Act in Jamaica. The Concept Note was submitted to the MIIC's MSME Unit and was used to inform preparations of a submission to Cabinet.

Other activities related to the sector included the:

- implementation of business development support programmes for SEs including the Jamaica Social Investment Fund's (JSIF) Capacity Building support with the European Union Poverty Reduction Programme (PRP IV). This resulted in the provision of grant funding of \$18.0 million by JSIF to six enterprises for capacity building
- extension of technical support by JSIF valuing \$12.0 million in business development to 30 SEs/Community-based Enterprises. A total of 142 participants (79 females, 63 males), benefited from workshops which cost \$12.0 million. The focus areas of the workshops included financial management, project management fundamentals, marketing for small businesses, customer service, basic business management, entrepreneurship, report and proposal writing, writing a business plan, strategic planning, and accounting skills for supervisors
- coordination and implementation of a partnership between the Jamaica Stock Exchange (JSE) and the

Inter-American Development Bank (IDB) on a project *Innovating Social Sector Financing*. The two main activities executed were the engagement of consultants to undertake the development of a Social Impact Measurement Framework and Training Strategy & Online Curriculum and a Demand & Supply assessment (Market Research on the Social Sector)

- addition of a Master's degree in Social Entrepreneurship in the programme offerings at the Excelsior Community College
- training of 110 youths from 13 schools through the British Council's SE in Schools Programme to support online learning. Three of the schools focused their SE's on identifying COVID-19 solutions. The Programme costs \$13.1 million.

In the area of International Development Partner support, the PIOJ and MIIC successfully secured Technical

ICR Facility Reform Outputs



Draft Legislation for Jamaica's Social Enterprise Legal Status Act for submission to the Chief Parliamentary Council (CPC),



Development of a Marketing Plan and Resource Mobilization Plan, including promotional activities, public outreach and sensitization sessions, that would provide a guide for SEs to access additional markets. These sessions covered topics such as public procurement and value chain integration.



Delivery of three training workshops, one for public officials and government facilitators, one for private sector partners and a combination one for public officials, private sector and social enterprise practitioners

Assistance for Jamaica under the European Union and British Council Investment Climate Reform (ICR) Facility, focusing on the Business Environment Reform and Capacity Building components. The approved facility will provide support to strengthen the SE sector of which there are three main outputs.

National Security Interest in Personal Property Registry (NSIPP)

The NSIPP is a web-based platform used for registering and searching for notices of security interests in movable assets and is administered by the Companies Office of Jamaica (COJ). A total of 22 772 loans were issued utilizing NSIPP, an 18.6 per cent decline compared with the previous year. This consisted of loans to individuals, micro, small, medium and large firms. Of this total, 2 098 were business loans and 20 674 were individual loans. Of the business

loans 1 863 were to MSMEs. This was a decrease of 5.5 per cent relative to 2019.

Micro Investment Development Agency (MIDA)

In keeping with the need for public sector rationalization to drive efficiency and effectiveness, Cabinet approved a decision for the closure and winding up of MIDA. The MIDA has traditionally functioned as a wholesaler of funds to an approved network of retail micro financing institutions (MFIs).

At the end of 2020, the majority of the planned activities for the closure of the entity had been completed, with the remainder of the planned activities to be fully completed by the end of FY 2020/2021. The MIIC reported that it was in the final stages of transferring the financial resources of MIDA into the National Export-Import Bank of Jamaica (EXIM Bank) to facilitate the offering of affordable loan products to productive MSMEs. This will allow the Bank to develop and offer specialized lending products at affordable rates, with a focus on the export markets to promote growth and development of productive MSMEs.

Digitization Programme for MSMEs

The MIIC developed a Digital Transformation Initiative intended to assist MSMEs to internationalize their operations through electronic commerce (e-commerce). The Ministry has forged alliances with two external providers to facilitate access to technology to establish e-commerce platforms to increase access to overseas markets.

The Ministry collaborated with, an e-commerce generator—whose turnkey solution is connected with regional partners in the financial services sector and courier service providers—to provide the following offerings to MSMEs:

- a simple and robust platform for the creation of online shops
- invoicing and inventory management
- continuous support through emails and online events
- easy payment buttons with social media integration
- logistics functions for worldwide shipping through couriers.

Currently, more than 2 000 MSMEs in all industrial sectors in Jamaica have online access to sell their goods and services globally, thereby improving their ability to increase revenue, create employment, generate foreign exchange and scale-up their operations.

Jamaica Business Development Corporation (JBDC)

The JBDC worked to facilitate sustainable modernization and growth in the productive sector specifically for MSMEs providing 1 657 clients with business, technical

and market access support services. Through these exercises information on the MSME sector was made more comprehensive with 1 081 of the clients served providing complete biography and industry data.

When disaggregated, 48.0 per cent of the businesses

BOX13.1 BREAKDOWN OF THE SECTORS SERVED BY THE JBDC	
Percentage of total clients	Sector
14.0	Manufacturing & Production
11.0	Service
10.8	Fashion and Apparel
9.0	Retail
7.8	Accommodation
47.4	Education, Gift & Craft, Aromatherapy, Agriculture & Fisheries, Mining, Finance & Insurance, Food Services

the JBDC engaged were female-headed, 40.0 per cent were male headed while 12.0 per cent were co-owned. These were effected through various mediums including virtual webinars (94), seminars and trainings. Market access was generated for more than 61 suppliers through the JBDC's e-commerce platform. This resulted in employment being created for 58 persons and earnings of \$438.0 million within the MSME sector.

The Development Programmes/Projects and Events carried out by the JBDC included the:

- *COVID-19 Response Initiatives* - The impact of COVID-19 and the associated safety measures to stem the spread of the virus led to the increased utilisation of technology in the continuation of webinars and programs in the MSME sector. A new weekly webinar series *JBDC Virtual Biz Zone* was held in June to maintain lines of communication with clients and the team. In addition, the JBDC hosted its Virtual Gift and Craft Biz Zone, following the launch of the National Craft Policy in July. The National Craft Policy, developed by the Ministry of Tourism in partnership with the JBDC, aimed to streamline the Jamaican craft industry by facilitating improvements in quality, variety, value, sales, customer satisfaction and profits
- *Employee Engagement Seminar 2020* - This was a series of virtual seminars held every Thursday in October with the objective of training entrepreneurs to:
 - gain employees' solid commitment to their organisation's goals, culture and brand
 - develop employees who consistently go the extra mile to produce results in light of the new circumstances presented by COVID-19

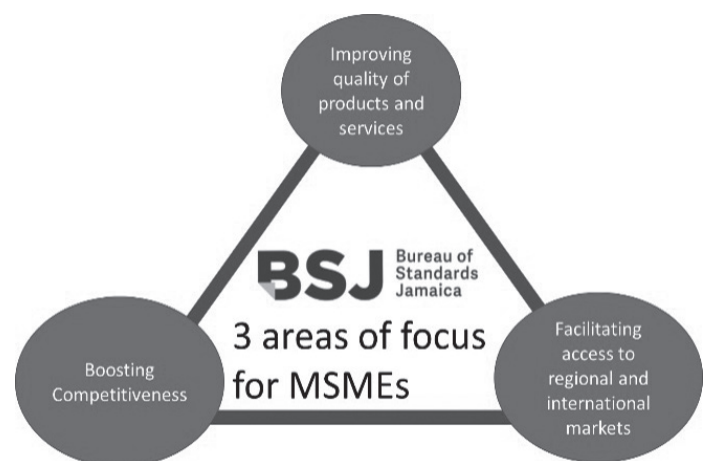
- be empowered to create and implement the ultimate employee experience through strategy execution.
- *Global Entrepreneurship Week 2020* – executed in November under the theme IDEATE. INNOVATE. ACTIVATE. The events and webinars held during the week included:
 - JBDC Virtual Biz Zone – The Design Act 2020 (JIPO)
 - JBDC Virtual Biz Zone – Simple Techniques in Bead Making
 - JBDC Virtual Biz Zone – The Patent Act 2020 (JIPO)
 - Business Dialogue Forum
 - Partnerships for Growth – Signing of Memorandum of Agreement with partner CIAL Dun & Bradstreet¹
 - JBDC In Concert – Cultural and Creative Sector
 - JBDC Virtual Gift & Craft Biz Zone
 - Brand Jamaica Design Lab
 - The Entrepreneur’s Journey
 - Building Opportunities for Sweet Success – B.O.S.S MAN/B.O.S.S. LADY of the year awards
- *Proposal Writing Intervention* – In July, the JBDC hosted a Social Return on Investment (SROI) Virtual Round-Table and Grant Funding Proposal Writing Workshop for SEs. The Virtual Round-Table focused on examining the progress of local SEs shifting from subsistence models towards high growth models, while the workshop focused on developing SE’s ability to achieve growth through accessing grant funding. The workshop focused on assisting social entrepreneurs to:
 - construct strategic proposals to access grant funding for start-up activities and developmental projects
 - understand the dynamics of grant fund proposal writing from local and international donor’s perspective
 - identify local and international sources of grant funding for social enterprises
 - navigate the due diligence requirements of donors.
- *ACP-EU UNDP² Development Minerals Programme* –JBDC compiled a Business Development Training

Reference Resource Handbook, to act as a guide in providing information to enhance entrepreneurial training, creating knowledge products, and building the capacities of operators within the minerals sector. The JBDC provided on-going support to six of the participants within the programme with an emphasis on improving their financial management and business planning capabilities

- mapping of the Creative & Cultural Industries (CCI) in Jamaica – The JBDC signed an Operation Alliance Agreement in August 2019 with the British Council to gather data on the CCI in Jamaica. The JBDC commenced the project in January and was scheduled to be carried out over the period January 6, 2020–April 30, 2020. This end date was extended to December due to delays related to the pandemic. The information collected on nine categories will be used to review and update existing strategies and action plans for the development of CCIs in Jamaica as the first step towards a comprehensive mapping exercise.

Bureau of Standards Jamaica (BSJ)

The BSJ continued to employ a three-pronged approach in its contribution to the development of MSMEs. Gazetted notices were received for 63 standards of which 56 were product standards and seven were service standards for sectors such as food, electrical products, tourism, security resilience, customer contact centres and manufacturing. The majority of the standards (53) were adoptions of international standards, while two were adoptions of regional standards. The remainder was allocated among the categories revision (one), and developments (seven).



1. CIAL Dun and Bradstreet is an international credit reporting agency. It collects information on companies who apply for a Data Universal Numbering System (DUNS) number and stores it in a database. Other companies who wish to do business with that entity can access information on their creditworthiness and credit history via the DUNS. CIAL and DUNS also offer under the partnership, tools to MSMEs such as a business identification, digital badge, business analysis report, Business-to-Business (B2B) matchmaking and a credibility certificate.
2. The Africa Caribbean Pacific (ACP) – European Union (EU) and the United Nations Development Programme (UNDP)

Nineteen training courses were delivered via 389 training sessions benefiting 449 participants. The impact of the social distancing safety measures implemented by the GoJ to stem the spread of COVID-19 led to a blended modality in the delivery of the training sessions, with face-to-face session being held pre pandemic and virtual sessions since its onset. The topics covered were related to good manufacturing practices, internal auditing, HACCP management programme, ISO 22301 Business Continuity, Documentation Requirements for ISO 9001 & Process Mapping and ISO 22000:2018 Food Safety Management System.

To increase the level of awareness of the importance of standards, quality, and related issues the BSJ engaged in several initiatives (Box 13.2).

Technical and training support for the MSME sector included:

- assistance to 34 clients referred by the JBDC under the three-year Memorandum signed with the BSJ in March 2017. These clients received discounts

totalling \$0.7 million on selected products and service areas offered by the BSJ

- assistance to 15 members of the Jamaica Agro-Processors Association (JAPA) through discounts totalling \$1.1 million on products and services accessed by these clients
- the provision of discounts for services totalling approximately \$0.4 million to 11 small business manufacturers from the food and cosmetics sectors, as part of their status as a Business Development Organisation (BDO) under the Voucher for Technical Assistance Programme (VTA) with the DBJ. In July, the DBJ secured support for its VTA from the BSJ by renewing a Memorandum of Agreement whereby the DBJ would pay up to 70.0 per cent or \$0.2 million (whichever was lower) of the cost of technical services given to individual MSMEs by the BSJ. Services ranged from laboratory

BOX 13.2
BSJ'S EDUCATIONAL/PROMOTIONAL INITIATIVES

Initiative	Purpose
Bamboo Leaves Seminar (January)	Information was shared on the uses and benefits of bamboo leaves in various industries with the aim of encouraging innovation and entrepreneurship. Approximately 45 persons representing government, industry and academia attended the seminar.
Webinar for Export Max III Programme Beneficiaries (August)	The Export Max III Programme is administered by JAMPRO in partnership with JBDC and the Jamaica Manufacturers Export Association. The BSJ as a sponsor had committed to providing contributions totalling \$15.0 million over three years. The webinar under the theme: "Prepare to Level Up" catered for 11 processed food manufacturers.
Online Workshop on the ePing SPS & TBT Notification Alert System (August)	BSJ hosted this workshop in collaboration with the Jamaica Customs Agency. The BSJ shared information on the functionalities and features of the system and the benefits of the system to business operations. The ePing is a global trade alert system launched by the United Nations, International Trade Council, and the World Trade Organization (WTO) to boost market access for developing countries and promote trade. It is a publicly available and self-subscribing system that allows timely access to product requirements (also referred to as Sanitary and Phytosanitary Measures (SPS) or Technical Barriers to Trade (TBT)).
Jamaica Standards Network Meeting <i>COVID-19 and the Food Industry: Food Safety – From Farm to Fork</i> , (September)	Information was shared by representatives from the Ministry of Health and Wellness, Plant Health Quarantine, Rural Agricultural Development Authority, and the National Certification Body of Jamaica (NCBJ) on how MSMEs in the food industry can take advantage of standards to overcome food safety challenges and have success during the pandemic; the benefits of following food safety standards and protocols and good agricultural practices; and the benefits of certification. The session was attended by 61 food industry stakeholders.
Food Processors Webinar (September)	Information relevant to the growth of their businesses was provided to 38 MSMEs in the food-processing sector on the services offered by the BSJ, NCBJ and the National Regulatory Authority of Jamaica.
Webinar on Amended Food and Nutrition Regulations, (October)	Food and Drug Administration officials provided the 98 attendees (MSMEs, and persons from educational and scientific institutions and government agencies) with information on the amended food and nutrition labelling requirements for products imported into the United States of America. These regulations were promulgated under the US Food Safety Modernization Act, 2011.
Agribusiness Development Conference (November)	The theme of the conference was Exploring Opportunities and Building Resilience and the organiser was e-Biome, a global scientific research and development entity. Information was disseminated on the benefits of using standards in improving agricultural and value-added outputs and of accessing the certification services offered by the NCBJ.

testing (microbiological, chemistry, calibration, scale testing, label assessment), registration of establishment to training and sale of standards

- the provision of discounts of approximately \$0.2 million on selected products and service areas to 11 members of the JMEA through an MOU under the BSJ Business Partnership Programme (BPP).

To develop the capacity of MSMEs to meet the standards of the US *Food Safety Modernisation ACT (FSMA)*, two pre-Food and Drug Administration (FDA) visits to food facilities were conducted to prepare for the FDA inspections. In addition to the identification of areas for improvement, information was shared on US market access requirements for processed food products, the *modus operandi* of FDA Inspectors; the relevant inspection report forms used by the FDA, and the types of documentation/records that should be readily available. There was also ongoing work in the support for the Bamboo Products sector which included technical guidance in product development and training for producers of bamboo craft in the use of computer aided machines to increase the volume and pace at which goods were produced.

United States Agency for International Development (USAID)/Jamaica

The USAID partnered with the Organisation of American States (OAS) in their *New Path* activity, a programme designed to impact the juvenile criminal justice system through the strengthening of the capacity of the Department of Correctional Services (DCS) of Jamaica to offer better care to youth. Under this initiative a total of 49 business were created by youth who participated in a residential program (called *Pitch It* - learning by doing) and micro-grants received to establish self-owned businesses that benefit them and their families. Another 22 youths received training and micro grants in establishing micro-farms in their rural communities. USAID supported the development of a new holistic reintegration curriculum and the implementation of train-the-trainer courses to strengthen the capacity of staff at the juvenile facilities to deliver these activities. An outdoor sports court and multi-purpose building were constructed to accommodate up to three classrooms, including an information technology lab and a cosmetology area. Spaces were also remodelled to accommodate an additional four classrooms.

Accessing the Impact of COVID-19 on MSMEs

MSMEs are generally the more vulnerable firms under normal circumstances and this was exacerbated under the pressure of the pandemic. Their ability to pivot was hindered by capacity constraints and access to financing,

as evidenced by two assessments undertaken by the Private Sector Organization of Jamaica (PSOJ) and the IDB-funded July 2020 Report *Accessing the Impact of the COVID-19 Pandemic on Jamaican Businesses (with an emphasis on MSMEs)*. The study examined the impact of containment measures to combat the spread of the COVID-19 pandemic on Jamaican businesses, with a focus on MSMEs. The assessment was primarily based on a survey of 390 non-financial businesses across all sectors, parishes, and business size. The main survey results were supplemented by responses from a small sample of financial firms, as well as interviews with key private and public sector stakeholders.

The findings revealed that:

- the most prevalent concern for the businesses surveyed was inadequate liquidity, identified among 80.2 per cent of respondents. Only 1.5 per cent of the firms responded to the pandemic by permanently ceasing operations and closing their business
- in response to the effect of the pandemic some of the firms surveyed sought new clients or markets, developed new products or services, and sourced substitutes for raw materials or supplies
- there was an average of 39.0 per cent decline in monthly sales, with larger proportions of micro and small firms relative to medium-sized and large firms experienced reductions in sales of between 61.0 per cent and 100 per cent
- more than half of the respondents reported having laid-off workers up to the end of May 2020. On average, firms laid-off just over a quarter of their workforce. However, this was higher for micro and small firms, with over a fifth of the respondents in these categories indicating lay-offs between 81.0 per cent and 100.0 per cent of their workforce. The assessment showed that almost 30.0 per cent of respondents in hospitality, creative and related service sectors reported lay-offs of 81.0 per cent to 100.0 per cent
- a portion of the respondents did not utilize traditional sources of finance. More than half of the firms surveyed relied on personal savings to meet between 61.0 per cent and 100.0 per cent of their business' finance needs. Micro enterprises were most likely to utilize personal saving with 64.8 per cent of micro firms reporting same. This was followed by small firms (39.2), medium-sized enterprises (25.0 per cent) and 16.7 per cent of large companies. A number of the firms sought loans from commercial banks, despite the fact that commercial banks tend to be more risk averse towards MSMEs. The results also indicated that most MSMEs did not utilize non-credit sources of financing, such as equity financing. As at

end-May 2020 more than half of the respondents had acknowledged that their ability to repay their loans had been impacted by the pandemic.

Business and Consumer Confidence

Business Confidence

Business confidence declined relative to 2019 with the Business Confidence Index registering an average of 120.5 points compared with 143.6 in 2019. All quarters recorded lower performance than 2019. This trend was also evident across the sub-indices Current Business Conditions down 43.2 points to 124.7 points and the Index of Business Expectation down 29.7 points to 118.9 points.

An analysis of the sub-index components showed that Current Return on Investments and Investment Expansion Climate, which drive the performance of Current Business Conditions, declined to an average of 72.5 and 102.3 points, respectively. The decline in confidence with regards to Business Expectation was also evident in firms' views expressed for the components Expected Change in the Economy down 16.5 points to 133.5 points, Expected Change in Firms Finances down 17.8 points, to 149.5 points, and Expected Changes in Profitability down 20.2 points, to 138.3 points.

Consumer Confidence

There was a decline of 30.1 points to 150.1 points in the average Index of Consumer Confidence relative to 2019. This resulted from a decline in the sub-indices Current Economic Conditions by 64.2 points to an average of 154.5 points and Index of Consumer Expectation by 18.8 points to an average 148.6 points.

The lower performance of Current Business Conditions and Current Job Prospects components drove the out-turn of Current Economic Conditions sub-index. The decline in confidence registered for the Index of Consumer Expectation stemmed from consumers' less than optimistic views as it relate to Expected Business Conditions, Expected Job prospects and Expected Change in Income which all declined relative to 2019.

PERFORMANCE

A total of 8 267 MSMEs filed returns compared with 12 216 in 2019. This was 91.6 per cent of the total number of firms that filed returns. A disaggregation of preliminary GCT data showed a decline in all three categories Micro, Small and Medium. The number of firms in the micro category declined by 3 534 to 2 923, small firms by 256 to 3 456 and medium firms by 159 to 1 888 firms (Table 13.1).

TABLE 13.1
NUMBER OF MSMES USING TO GCT RETURNS, 2018–2020

INDUSTRIES	2018 ^r			2019 ^r			2020 ^p		
	Micro	Small	Medium	Micro	Small	Medium	Micro	Small	Medium
ARGICULTURE, FISHING, HUNTING & FORESTRY	72	33	26	73	31	25	28	32	24
MINING & QUARRYING	18	6	6	15	5	5	3	4	6
MANUFACTURING	479	239	177	458	227	187	212	214	180
ELECTRICITY, GAS & WATER	10	3	0	7	5	1	4	6	0
CONSTRUCTION	227	77	37	185	84	42	77	77	34
WHOLESALE & RETAIL TRADE; REPAIR OF MOTOR VEHICLES	2 794	1 992	1 081	2 588	1 987	1 164	1 310	1 860	1 092
HOTELS & RESTAURANTS	390	199	68	362	207	79	208	170	57
TRANSPORT, STORAGE & COMMUNICATION	371	165	71	334	178	78	138	159	65
FINANCIAL INTERMEDIATION	115	58	43	112	56	48	32	53	49
REAL ESTATE, RENTING & BUSINESS ACTIVITIES	2 067	744	318	1 950	787	340	753	753	318
PUBLIC ADMINISTRATION & DEFENCE, COMPULSORY SOCIAL SECURITY	60	5	1	55	11	3	16	11	3
EDUCATION	8	4	0	6	2	1	2	2	0
HEALTH & SOCIAL WORK	24	22	9	23	18	11	11	15	11
OTHER COMMUNITY SOCIAL & PERSONAL SERVICE ACTIVITIES	282	129	57	289	114	63	129	100	49
TOTAL	6 917	3 676	1 894	6 457	3 712	2 047	2 923	3 456	1 888

r – revised

p – preliminary

Source: Compiled by the PIOJ from data received from Tax Administration Jamaica Limited

TABLE 13.2
REAL GROSS SALES FOR MSMES USING GCT RETURNS, 2018–2020
(\$ MILLION)

INDUSTRIES	2018 ^r			2019 ^r			2020 ^p		
	Micro	Small	Medium	Micro	Small	Medium	Micro	Small	Medium
AGRICULTURE, HUNTING & FORESTRY	3	14.6	54.4	2	12.5	44.7	1.3	11.4	39.5
MINING & QUARRYING	0.2	2.1	16	0.2	1.4	12.9	0	0.8	9.7
MANUFACTURING	22.9	93.5	363.7	14	79.7	350.9	11.4	68.3	307.4
ELECTRICITY, GAS & WATER	0.4	1	-	0.3	1.7	1.1	0.2	1.9	-
CONSTRUCTION	9.3	28.9	69	4.7	26.7	66.2	3.5	23	53.6
WHOLESALE & RETAIL TRADE; REPAIR OF MOTOR VEHICLES	150.5	777.1	2 025.1	94.5	731.9	2 039.1	74.5	628.7	1 734.7
HOTEL & RESTAURANTS	20.7	69.9	121.7	12.8	70.7	133.9	11.8	49.6	82.7
TRANSPORT, STORAGE & COMMUNICATION	16.9	61.7	122.4	8.9	59.6	131.5	7.9	49.8	102.4
FINANCIAL INTERMEDIATION	3.7	22.8	77.8	2.8	22.7	89.4	1.6	18.3	77.6
REAL ESTATE, RENTING & BUSINESS ACTIVITIES	100	271	582.5	60.1	274.5	602.5	41.8	235.3	505.4
PUBLIC ADMINISTRATION & DEFENCE, COMPULSORY SOCIAL SECURITY	2.4	2.3	4.1	1.3	3.2	3	0.9	3.1	3.2
EDUCATION	0.3	1.6	-	0.1	0.6	1.3	0.1	0.7	-
HEALTH & SOCIAL WORK	1.4	10.8	15.6	1	8.2	17.8	0.7	6.3	16.3
OTHER COMMUNITY SOCIAL & PERSONAL SERVICE ACTIVITIES	13	45.5	106	8.6	37	111.7	6.2	30.7	71.3
TOTAL	344.7	1 402.7	3 558.5	211.2	1 330.4	3 605.8	161.8	1 127.9	3 003.7

r – revised

p – preliminary

Discrepancies due to rounding

Source: Compiled by the PIOJ from data received from Tax Administration Jamaica Limited

Assessed across industry categories, the number of firms declined for all industries. However, Wholesale & Retail Trade; Repair of Motor Vehicles Motorcycles & Personal Household Goods continued to account for the largest number filed with 4 262 returns. This was followed by Real Estate, Renting & Business Activities and Manufacturing with 1 824 and 606 firms, respectively.

The value of real sales by MSMEs declined by 16.6 per cent to \$4 293.4 million compared with 2019 and accounted for 18.2 per cent of real total sales. The data showed that sales declined for all categories with Micro declining by 23.4 per cent, Small by 15.2 per cent and Medium firms by 16.7 per cent (Table 13.2). An assessment of the data by industry category showed that all industry categories also had lower sales relative to 2019. As it relates to proportion, Wholesale & Retail Trade; Repair of Motor Vehicles, Motorcycles & Personal Household Goods category accounted for the largest share of sales with 56.8 per cent. The category Real Estate, Renting & Business Activities accounted for 18.2 per cent while sales from Manufacturing was 9.0 per cent of total sales.

Employment

Using the Own Account Worker (sole trader) from the Labour Force Survey as the unit of analysis, the data showed that there was a 5.6 per cent decrease to 390 233

in the total number of Own Account Worker relative to 2019. The number of males decreased by 5.0 per cent to 12 742 and the number of females by 6.6 per cent to 10 450. Despite the contraction, its share of the employed labour force increased by a 0.6 percentage point to 33.8 per cent relative to 2019. The increase in the share was as a result of the decrease in the total employed labour force (Figure 13A). The Own Account Worker category remained the second largest grouping of employed persons, only behind paid non-government employee. Own Account Workers had a real output per worker of \$163 471.60.

Financing

With suitable financing cited as one of the main challenges faced by MSMEs, the GoJ continued in its efforts to provide affordable financing through wholesale lending institutions such as the DBJ (Table 13.3). This is supported by the private sector financial institutions that provide various financial products to the market.

Wholesale Financing

Development Bank Jamaica Limited (DBJ)

The value of loans approved increased by 31.6 per cent to \$4 364.4 million while the number of approved loans decreased by 8 491 to 2 249. However, the value of loans disbursed decreased by 14.3 per cent to \$2 367.6 million (see

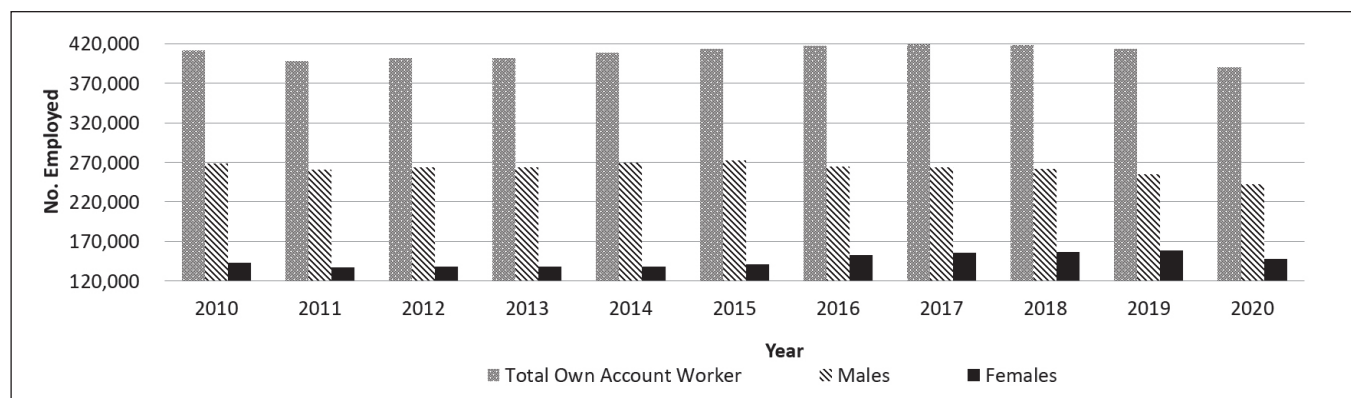


FIGURE 13A: EMPLOYED OWN ACCOUNT WORKER, 2010–2020

TABLE 13.3
DISBURSEMENTS BY WHOLESALE AGENCIES, 2016–2020
(\$Million)

AGENCIES	2016 ^r	2017	2018	2019 ^r	2020 ^p	%Change 2020 2019
Sagicor Bank Jamaica Limited	50	n/a	n/a	n/a	n/a	n/a
Micro Investment Development Agency	136	165	158	50	0	n/a
National Insurance Fund	n/a	n/a	n/a	n/a	n/a	n/a
Development Bank of Jamaica	2 026.1	2 361.0	2 265.4	2 761.7	2 367.6	- 14.3

n/a – not available

Discrepancies due to rounding

Source: Compiled by the PIOJ using data supplied by MIDA and DBJ

Table 13.3). The disbursement by channels was as follows:

- Micro Finance Institutions (MFI) – \$1 028.4 million, down 51.6 per cent
- Approved Financial Institutions (AFI) – \$1 339.2 million, up 110.8 per cent.

The categories Agriculture & Agro-Processing, Manufacturing and Distribution/Trade all had lower disbursements relative to 2019 with declines of 33.1 per cent, 80.5 per cent and 66.8 per cent, respectively. There was no disbursement to Tourism. Contrary to this, Services & Transport had a 37.9 increase in value of disbursements, accounting for 68.7 per cent of the total value of disbursements. There was a disbursement of \$58.4 million to Mining relative to no disbursement in 2019.

Retail Lending

Jamaica National Small Business Loan (JNSBL) Limited

The value of the loan portfolio increased by 6.5 per cent to \$4 792.2 million. In addition, there was funds under management for the Tourism Enhancement Fund (\$235.3 million) and Branson Centre (\$4.3 million). The value

of loans disbursed decreased by 17.6 per cent to \$4 383.9 million and the number of loans by 28.3 per cent to 18 998 loans (Table 13.4).

Using the type of economic activity as the unit of analysis, the disbursement data showed that as it related to the value of loans, the category Personal Loans accounted for the largest share of disbursement with 38.1 per cent. This was followed by Trading & Distribution with 32.4 per cent, Other Services at 11.2 per cent and Agriculture with 9.4 per cent (Figure 13B). Analysed by volume, the largest number of loans went to the Trading & Distribution, 38.2 per cent, Personal, 31.5 per cent, Agriculture 11.8 per cent and Other Services, 9.6 per cent.

When assessed by geographical distribution, St Catherine continued to account for the largest share of the loans disbursed with 21.0 per cent. This was followed by Other parishes (includes five parishes) with 15.0 per cent, Manchester 14.0 per cent and St Ann 9.0 per cent (Figure 13C).

A review of the loan products showed that Micro Business Loans (Bizgrow) was lower in number and value relative to 2019 but continued to account for the largest number and value of loans disbursed with 64.7 per cent

TABLE 13.4
DISBURSEMENTS BY SELECT RETAIL LENDING AGENCIES, 2016–2020
(\$MILLION)

AGENCIES	2016	2017	2018	2019	2020	% Change 2020 2019
Jamaica National Small Business Loan	3 846.9	5 140.0	6 023.8	5 319.3	4 383.9	- 17.6
EX-IM Bank	5 254.7	5 739.6	8 010.0	4 274.0	3 003.0	- 29.7
Access Financial Services	811.3	1 019.1	974.5	987.0	602.0	- 39.0
NCB SME ^a	n/a	38.3	42.4	26.6	30.1	13.2
Credit Union	1 338.2	1 730.2	1 863.8	2 574.8	1 309.6	- 49.1

n/a – not available
 r – revised
 a – billion

Source: Compiled by the PIOJ using data received from the respective financing agencies

and 52.8 per cent, respectively. This was followed by Personal Loans with 31.5 per cent of the proportion of loans disbursed and 38.1 per cent of the value. Education Loans was the third largest category with 2.1 per cent of loans and 2.5 per cent of the value disbursed (Table 13.5).

In response to the COVID-19 pandemic the JNBSL launched its COVID-19 Lifeline Loans to meet the need of Entrepreneurs. The Loans products were created to assist businesses that suffered negative impacts of the pandemic.

These included:

- Lifeline Personal up to \$0.5 million
- Lifeline Business up to \$0.5 million
- Lifeline Recovery Micro up to \$1.5 million
- Lifeline Recovery Small Business up to \$8.0 million.

Features of these loans included:

- a built-in moratorium of three to six installments to provide a financial cushion to clients

- low interest rates to provide relief
- access to flexible payment terms that allow ideal repayments for each client
- provision for clients who experienced loan default to make their loans current, while accessing flexible repayment terms at low interest rates.

There was also the provision of payment holidays to more than 4 925 clients at approximately \$84.0 million. In addition, there was the restructuring of 2 845 loans at \$1 200 million. The JNSBL also established a lifeline Coach Video Series towards providing information to generate ideas and cope with the pandemic. The series included hoteliers, farmers, cosmetologists, and others.

There was a partnership with the Ministry of Economic Growth and Job Creation to disburse and manage the climate Change Adaptation Line of Credit to MSMEs in the tourism and agriculture sector. A total of 115 Climate

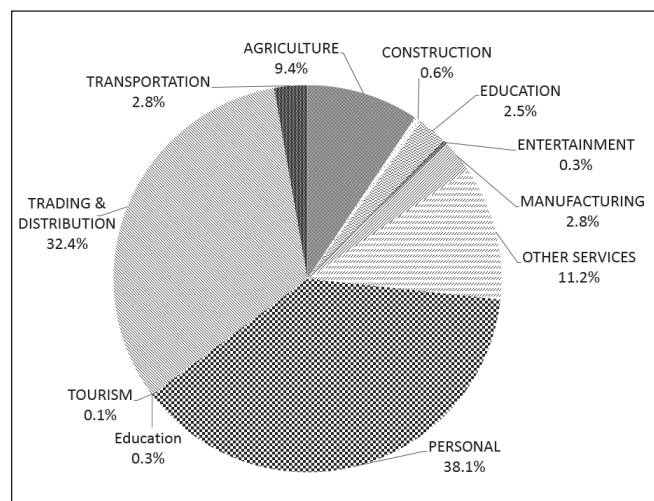


FIGURE 13B: JNSBL LOAN DISBURSEMENT BY TYPE OF ECONOMIC ACTIVITY, 2020

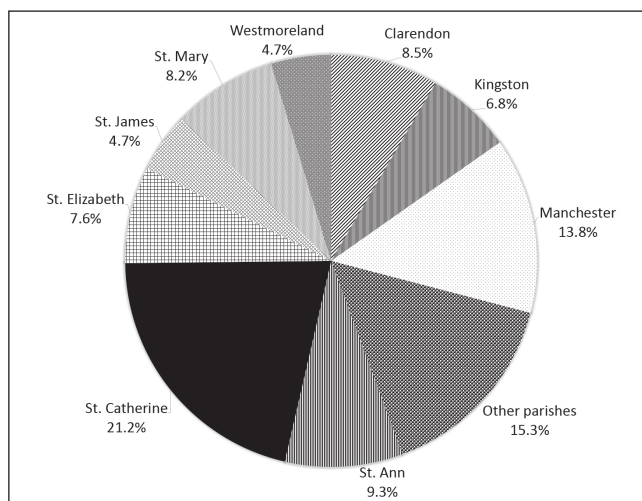


FIGURE 13C: JNSBL LOAN PORTFOLIO BY PARISH, 2020

TABLE 13.5
JNSBL LOAN DISBURSEMENT, 2016–2020

	NUMBER OF LOANS DISBURSED				
	2016	2017	2018	2019	2020
Bizgrow(Micro Business Loans)	14 548.0	20 385.0	18 377.0	18 314.0	12 299.0
Bizboost	22.0	39.0	n/ap	n/ap	n/ap
Bizevent	606.0	356.0	n/ap	n/ap	n/ap
Agriculture	8.0	14.0	21.0	9.0	8.0
Education	277.0	98.0	30.0	19.0	400.0
Motor Vehicle	395.0	416.0	540.0	93.0	47.0
Personal	7 771.0	6 732.0	8 418.0	7 710.0	5 991.0
Other ^a	955.0	n/a	240.0	346.0	253.0
Total	24 582.0	28 040.0	27 626.0	26 491.0	18 998.0
	VALUE OF LOANS DISBURSED (\$MILLION)				
Bizgrow(Micro Business Loans)	1 902.8	2 751.8	2 896.8	3 010.9	2 314.0
Bizboost	70.6	153.4	n/ap	n/ap	n/ap
Bizevent	56.7	38.0	n/ap	n/ap	n/ap
Agriculture	5.6	13.2	29.2	16.9	10.2
Education	48.9	15.3	6.8	2.7	109.1
Motor Vehicle	385.8	555.9	791.9	126.4	74.2
Personal	1 223.7	1 612.5	2 092.9	2 020.3	1 668.9
Other ^a	152.8	n/a	206.2	142.1	207.6
Total	3 846.9	5 140.0	6 023.8	5 319.3	4 383.9

a – Other category for 2018, 2019 and 2020 only includes SME Business, Climate Smart, Disaster Recovery and Transportation

n/ap – not applicable

Discrepancies due to rounding

Source: JNSBL

Smart loans at \$82.0 million were disbursed. The bank also continued to manage the Tourism Enhancement Fund and disbursed ten loans at \$25.0 million accumulating to \$858.3 million since 2001.

National Commercial Bank (NCB)

NCB's Loan Portfolio balance for Small and Medium Enterprises (SME) as at the end of the year was \$31.0 billion compared with \$26.6 billion in 2019. There was a decrease in the number of loans disbursed to 951 compared with 968 in 2019. (see Table 13.4). The Bank reported that SMEs were given access to increased single digit interest rate loan funding available with limited collateral from \$3.4 billion to \$20.0 billion. It also waived some fees for all customers to assist those who incurred unplanned expenses. The waived fees included the penalty interest for late loan repayment, breakage fees for fixed deposits, partial withdrawal fees for insurance policies and late payment fees for credit cards.

National Export-Import Bank of Jamaica (EXIM Bank)

The EXIM Bank continued its mandate of facilitating non-traditional exports & export credit financing as well as promoting Trade Credit Insurance to support small and medium-sized enterprises for domestic markets and exporters venturing into new global markets. The Bank disbursed 413 loans totalling \$3 003 million (\$1 004 million & US\$17.4 million) to SMEs (see Table 13.4). This represents a loan utilisation rate of 52.9 per cent.³ Measures were adopted by the Bank to assist clients in response to the impact of COVID-19 and the measures to stem the virus. These included a:

- special moratorium on principal and interest payments for specified periods to clients within the tourism sector. The special loan facilities were extended to clients that required new financing to diversify their business offering, due to the plethora of issues affecting the tourism sector

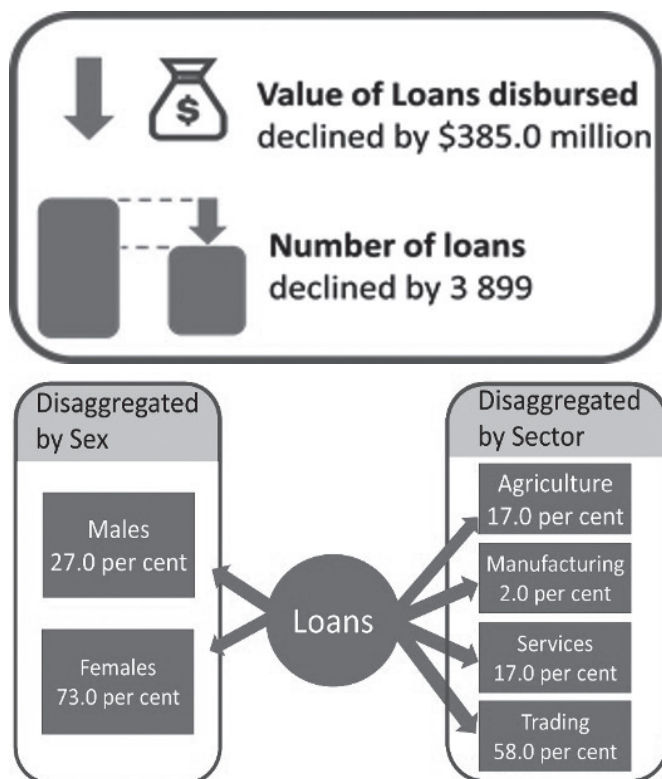
3. Loan utilization rate refers to the amount of credit you have used compared with how much credit you have been extended by a lender.

- moratorium on principal payments to clients external to the tourism sector on a needs basis
- restructuring of loan terms to include medium term loan tenure extensions and extensions on short term loan maturity dates.

The Bank also launched a new loan product *EXIM Express* which is a receivables- financing solution geared to small and medium-sized entities seeking working capital support. It allows small companies to leverage their receivables from government entities and publicly traded entities to release resources needed to finance the day-to-day operations of the business. *EXIM Express* covers 75.0 per cent of receivables with a maximum tenure of 90 days. Businesses can borrow up to \$10.0 million with a turnaround time of seven working days if all conditions are met.

Access Financial Services (AFC)

A total of \$602.0 million in loans was disbursed to MSMEs, a contraction of 39.0 per cent. The decline in disbursements was primarily a result of the impact on economic activities of the COVID-19 pandemic and the associated measures to stem its spread. There were 6 118 loans disbursed of which females received 73.0 percent. When analysed by sector, trading had the primary share of total number of loans disbursed. AFC implemented several initiatives in response to this impact. These included loan moratorium for periods up to three months and the implementation of digital solutions to process loan applications and loan disbursements (see Table 13.4).



Credit Unions

Ten credit unions provided loan data for the period, which showed that a total of 1 795 loans were disbursed. The loans were disbursed to micro and small enterprises and totalled \$1 309.6 million. (see Table 13.4).

OUTLOOK

Having completed 50.0 per cent of the terms of the MSME and Entrepreneurship Policy in 2020, MIIC will continue with the implementation of the remaining activities, including the full rollout of the SBDC Model in Jamaica, creating a robust platform for the operationalization of a secondary market for repossessed assets, thereby making the Security Interest in Personal Property Act work, among other key initiatives. As such, emphasis will be placed on the following:

- implementation the remaining activities in the MSME & Entrepreneurship Policy
- providing access to robust digital platforms to promote e-commerce solutions to facilitate MSME internationalization, growth, and development
- developing creative financing options for MSME growth and development
- establishing a secondary market e-commerce platform for movable assets
- implementing additional programs focused on the formalisation of MSMEs
- introduction of the full procurement regime to increase the participation of MSMEs in the public procurement process
- implementing a training, capacity building and awareness raising project for MSMEs participation in public procurement
- promote the strengthening of collaboration with MSME Alliance, SBAJ, YEA, JMEA and the PSOJ to move from advocacy to action on MSME access to finance
- improving the effectiveness of the NSIPP Registry under the Jamaica Secured Transaction Regime Project
- facilitating the creation of a robust enabling environment for the development of social enterprises in Jamaica.

As it relates to International Development Partner support and the activities approved under the facility to provide support for the strengthening the SE sector, this will be effectuated for the upcoming year. Also anticipated to be finalized is the completion of the Social Impact Measurement Framework and Tool under the JSE-IDB Innovating Social Financing project and through JSIF continued coordination of the Business Development Programmes for the SE sector. ■

CONSTRUCTION

INTRODUCTION

Real Value Added (RVA) for the Construction industry contracted by 0.8 per cent in 2020. This represented the second consecutive year of decline (Figure 14A), and accounted for 7.9 per cent of total RVA, 0.7 percentage points more than 2019. The decline in the industry was as a result of a reduction in the Building Construction category, which outweighed an increase in the Civil Engineering category. The contraction in Building Construction was a reflection of decreased activities associated with residential buildings, hotels and commercial office space.

The sale of Asphalt, a key input in the Other Construction category, declined. Also declining was the production of limestone, whiting, shale, sand & stone, and marl & fill. The reduction in the production and sales of some construction inputs stemmed from the completion of several major road infrastructure projects and the delayed construction of residential and commercial buildings. The production of silica sand, however, increased. The sale of construction-related goods also increased, as well

as the supply of cement to the domestic market, which grew by 11.8 per cent to 1 051 378.9 tonnes. The average employment¹ in the industry also declined, by 7.4 per cent to 100 033 persons compared with 2019 (Table 14.1).

The Coronavirus Disease 2019 (COVID-19), and the associated measures implemented by the Government of Jamaica to stem the spread, had a negative impact on the Construction industry in the first half of 2020, especially in the April–June 2020 quarter, when restrictions implemented were most stringent and uncertainty regarding the impact of COVID-19 was highest. This led to the industry declining by 14.5 per cent relative to April–June 2019. In the second half of the year, however, the industry grew, as some of the projects that were negatively affected, due to the uncertainty in the first half of the year, were expedited to meet project deadlines. The industry also benefited from road repairs in the last quarter, following the negative impact of Tropical Storms Zeta and Eta on the country’s road network. Continued work on these and other construction projects was facilitated by the exemption of construction-related work under the

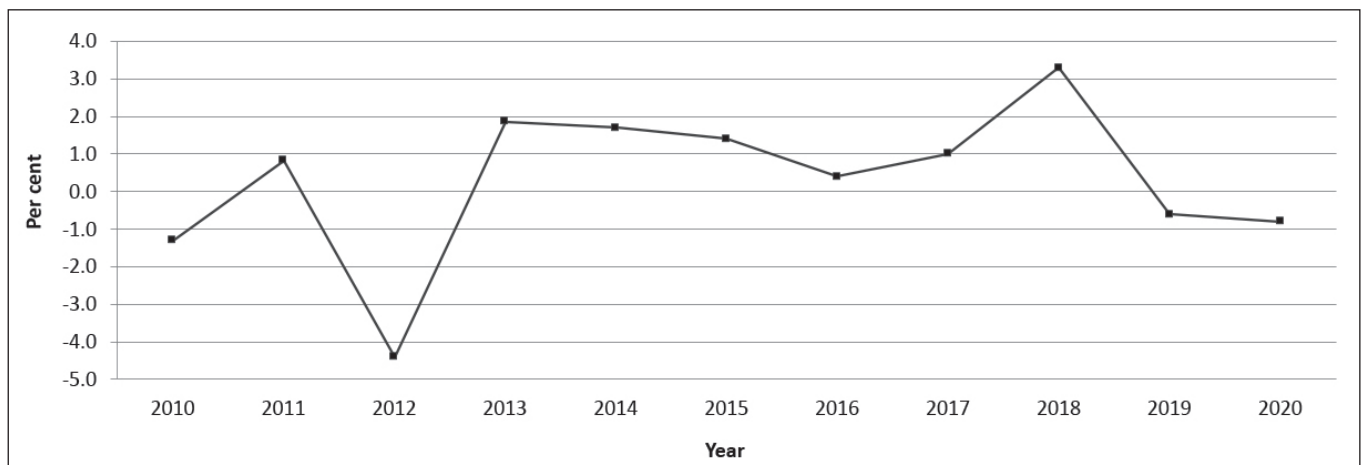


FIGURE 14A: REAL VALUE ADDED GROWTH RATES FOR THE CONSTRUCTION INDUSTRY

1. Average Employment represents data for January, July, and October of 2019 and 2020. This reflects the implementation of a change in Jamaica’s Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for July and October.

Disaster Risk Management Act. On April 28, 2020, the government announced the amendment of the Disaster Risk Management (Enforcement Measures), no. 4 Order, 2020 to allow for persons employed or contracted, to undertake construction activities. As a result, members of the industry were able to move about during the period of the curfew once they were going about their duty on a construction site. Construction workers were, however, obligated to abide by the work protocols instituted to ensure their safety and that of others by sanitizing and maintaining physical distance, as well as, to quarantine workers who tested positive for the disease.

Neither the operations of the National Works Agency (NWA), which is directly responsible for the improvement and maintenance of the main road networks of class A, B and C roads in Jamaica, nor the road infrastructure under its jurisdiction was significantly affected by the pandemic. Rather, the agency and other construction-related activities benefited from the restriction placed on the movement of people and traffic—as well as exemption from curfew, quarantine zone restrictions, and from the gathering of ten persons or more—as projects associated with the islandwide major road works experienced increased productivity and accelerated progress.

POLICY AND PROGRAMMES

The Ministry of Economic Growth and Job Creation (MEGJC) and Ministry of Housing, Urban Renewal, Environment and Climate Change (MHURECC) are charged to develop policy and programmes in the Construction industry. MEGJC is charged with oversight of economic growth and sustainable development in Jamaica, including responsibility for the land and works portfolio, and outlined the policy objectives for the Construction Industry. The Ministry of Housing, Urban Renewal, Environment and Climate Change (MHURECC) is charged with development of the housing sector and environmental sustainability, including responsibility for the housing portfolio. Policies and programmes of each ministry is broadly in accordance with Vision 2030 Jamaica – National Development Plan and the Medium Term Socio-economic Policy Framework (MTF) 2018–2021. The policy under MEGJC included:

Works Portfolio:

— Construction Industry Policy of Jamaica (CIPJ)

In recognition of the challenges facing the industry, and given its importance to the performance of other sectors, and its critical role in the growth and development of the country, the Government of Jamaica, through MEGJC, took steps towards the development of a comprehensive policy framework.

This framework seeks to guide the industry's operations in an attempt to minimize deficiencies, and boost the industry's contribution to economic growth and the competitiveness of the country in the regional and international markets. The CIPJ was tabled as a White Paper in the House of Representatives and the Senate on May 12 and May 22, 2015, respectively, and was to be implemented by a Construction Industry Development Advisory Board in accordance with Vision 2030. However, the decision was subsequently taken to refer the CIPJ to the Infrastructure and Physical Development Committee (IPDC) of the Houses of Parliament. Although at an advanced stage, the CIPJ was never implemented. It is the intention of the Ministry of Economic Growth and Job Creation (MEGJC) to revise the current policy document to include emerging issues and new developments, while expounding on measures to address inherent challenges that are inimical to the success of the sector.

Having received Cabinet's approval in 2019 for the Concept Paper to revise the Policy and develop a corresponding Implementation Plan, the MEGJC took steps to engage a consultant by way of the National Competitive Bidding Procurement Methodology; however, none of the bidders was successful. The MEGJC subsequently took additional steps to engage a consultant through the Single-Source Procurement Methodology, which is still under way. The projected timeframe for the revision of the CIPJ is 18 months and is expected to commence within the first quarter of Fiscal Year (FY) 2021/2022.

Among the programmes undertaken by MEGJC were:

- **Southern Coastal Highway Improvement Project**
The Southern Coastal Highway Improvement Project (SCHIP), signed between MEGJC and China Harbour Engineering Company Limited (CHEC), is divided into Part A and Part B. Part A, which includes the construction of a 28 km-long tolled dual carriageway highway from May Pen, Clarendon to Williamsfield, Manchester, is being implemented by the National Road Operating and Constructing Company Limited (NROCC). NROCC secured the planned right-of-way for the implementation of Part A during 2020, with construction works being 15.0 per cent complete.
Part B works is being implemented by the NWA and is divided into the following components:
 - Part B (ii) – road widening and improvement works on a 17.4km-long road section from Harbour View to Yallahs Bridge. This component of the works is being undertaken by CHEC.
 - Parts B (iii & iv) – road rehabilitation works

from Yallahs Bridge to Port Antonio and Morant Bay to Cedar Valley, which is a cumulative total of 122.5km. Parts B (iii & iv) were further divided into 15 construction packages based on length, value and complexity of works, and is being undertaken by local contractors sub-contracted by CHEC.

Throughout January–December 2020, engineering designs were substantially completed for Part B (ii) and works ongoing on the first five priority packages under Parts B (iii & iv), with percentage completions as follows:

- Package 4, Morant River Bridge to Prospect (8.95 km), 17.0 per cent
- Package 8, Hordley to Long Road (4.16 km), 42.0 per cent
- Package 10, Manchioneal to Fair Prospect (8.80 km), 22.0 per cent
- Package 14, Morant Bay to Georgia (14.70 km), 18.0 per cent
- Package 15, Georgia to Cedar Valley (11.74 km), 20.0 per cent.

— **Emergency Road Repair**

As a result of hydrometeorological² events, including Tropical Storms Zeta and Eta, the country suffered extensive damage to its road network during the year. Consequently, the NWA undertook emergency road repairs, which included the following:

- clearing of over 206 roads islandwide that were severely affected by landslides, mud flows, downed trees, washed out bridges and flooding
- commencement of a \$1.0 billion programme across all 63 constituencies. This included de-bushing, drain cleaning, sanitisation, waste removal, beautification, pothole patching and minor road repairs.

— **Port Royal Cruise Ship Terminal Development, Kingston**

The initial phase of the project is 97.0 per cent complete and includes the completion of: the terminal and bus loading buildings; roadways and the electrical works; pump house; sewage lift station; and promenade walkways. Ongoing works on a sewage treatment plant is expected to be completed by the end of the fourth quarter of FY2020/21. The final phase of the project, which is set for completion in the second quarter of FY2021/22, includes the development of a museum, an artefact garden, and a maintenance building.

— **Redevelopment of the Reynolds Pier, St Ann**

Construction of the Bus Staging Area commenced in August 2020 and is scheduled for completion by the end of FY2020/2021. This will complement works already completed.³

— **Redevelopment of Hampden Wharf, Trelawny**

The project was completed at an approximate cost of \$686.1 million. The objective of the Hampden Wharf development is to improve the attractiveness and ambience of the Falmouth Cruise Terminal and the town, to enhance the experience for both visitors and residents. It will also provide the desired increase in visitors, while allowing the community to benefit from interactions with the cruise passengers.

— **Kingston Logistics Park Development**

The project involves the construction of a steel frame structure to be used as a warehouse building. The construction of the warehouse is completed; however, minor paving, electrical and fire suppression works are outstanding. In addition, a 1 500m² building was completed to facilitate the relocation of the operations of the Container Security Initiative (CSI) and Jamaica Customs Agency (JCA), which currently operate on the footprint of the new warehouse.

— **Montego Bay Freeport**

The multipurpose Montego Bay Freeport project was completed and included the construction of a new Berth 1 to accommodate containerized cargo and to process vessels carrying liquefied natural gas and other fuels; as well as the expansion of Berth 2 to accommodate the larger vessels arriving in Montego Bay.

Policies undertaken by MHURECC were:

Housing Portfolio:

- **Development of the National Housing Policy and Implementation Plan** – This policy aims to outline a solution to the perennial housing crisis by providing an enabling framework where the citizens of Jamaica can access affordable, safe, and legal housing by 2030. This comprehensive framework provides a guide to the development of the housing sector, facilitates better utilization of the resources in the public and private sector, and responds to the diverse needs of the disadvantaged and vulnerable in the society. The policy seeks to promote a wide range of housing choices for all income levels by fostering partnerships

2. Refers to events of an atmospheric, hydrological or oceanographic origin such as tropical cyclones, floods, drought, heatwaves and cold spells, and coastal storms.

3. See Construction chapter in Planning Institute of Jamaica, *Economic and Social Survey Jamaica 2019* (Kingston: PIOJ, 2020).

with the private sector and other providers to increase the supply of housing solutions to meet projected demand. It also seeks to identify mechanisms for land accessibility to all income groups; support the delivery of social housing, particularly to the vulnerable and disadvantaged; and to establish mechanisms to reduce the impact of natural disasters and other emergencies on human settlements.

- The Policy was amended to incorporate comments from other consultations undertaken after it was tabled as a Green Paper in the House of Parliament in 2019. It is anticipated that the draft policy will be finalized and submitted to the Cabinet for consideration and approval as a White Paper in the House of Parliament in 2021.
- **Review of the Housing Public-Private Partnership Policy (HPPP), 2008** – The policy provides guidelines for the undertaking of Joint Venture and Private Facilitation arrangements for housing developments by the ministry and its agencies. Formerly the Joint Venture Policy, the HPPP seeks to provide a comprehensive framework that guides housing public-private partnerships in the housing sector. Following consultations with the Ministry of Finance and the Public Service, as well as the Attorney General Chambers, the draft policy was reviewed and further amendments made to include provisions for unsolicited proposals. It is anticipated that the document will be finalized, and subsequent consideration and approval as a White Paper sought from the Cabinet, to facilitate tabling in the House of Parliament in 2021.

PERFORMANCE

The performance of the industry was negatively affected by a decline in the Building Construction component, which was influenced by lower residential and non-residential activities, associated with reduced housing starts; contraction in the build out of commercial office spaces; and a decline in the renovation and construction of hotels. A further decline was tempered by an increase in the Civil Engineering component.

BUILDING CONSTRUCTION

Non-Residential Building

There was reduced construction activity in the non-residential component of the Building Construction category. Some of the projects undertaken during the

year were:

- Ocean Coral Spring, Trelawny – completion of 153 rooms to close Phase 1 of the project. Construction of Phase 2 began, which consists of 444 additional rooms
- Begona Hotel, Westmoreland – construction of 12 rooms for a boutique hotel
- Oceana Hotel by Hilton, Kingston – renovation of 68 rooms began
- Jamaica Blue Skies Beach Resort, Westmoreland – completion of 21 rooms
- The expansion of multiple Business Process Outsourcing (BPO) centres, including that of Ibex Global in Ocho Rios, St Ann.

Residential Building⁴

Housing Starts: There were 3 393 housing starts compared with 11 682 units for 2019. The National Housing Trust (NHT) accounted for 1 503 units of all starts for the year, representing a decrease of 6 617 units (see Table 14.1). Housing starts by NHT were disaggregated as follows:

- Home Owner's Loans, down 3 units to 493 units
- Construction Loans, down 43 units to 714 units
- Build-on-Own-Land (BOL), down 62 units to 296 units
- Housing Developments, recorded no units compared to 6 509 units in 2019.

For Private Developers under the NHT Interim Financing Agreement, there were 72 starts relative to no recorded starts in 2019. There were 1 818 starts by the Housing Agency of Jamaica (HAJ) relative to 3 562 starts in 2019.

Housing Completions:⁵ A total of 2 607 units were completed, an increase of 139 units compared with 2019. Of this total, completions by the NHT was 1 719 units, 323 units fewer than in 2019. Private Developers under the Interim Financing Agreement with NHT completed 772 units compared with 215 units in 2019, while HAJ recorded 116 units compared with 211 units in 2019.

OTHER CONSTRUCTION

Civil Engineering

There was an estimated increase in the Other Construction component. Four of the six institutions surveyed recorded higher capital expenditure on construction-related activities (Table 14.2). The entities that recorded higher expenditure were:

- National Works Agency (NWA), which expended

4. Data on housing starts and completions represent information from NHT, private developers under the NHT interim financing agreement and the Housing Agency of Jamaica.

5. Housing completions refer to the completion of basic infrastructure such as water, light and drainage on a housing solution.

TABLE 14.1
MAJOR PERFORMANCE INDICATORS OF THE CONSTRUCTION INDUSTRY, 2016–2020

Select Indicators	2016	2017 ^r	2018 ^r	2019 ^r	2020 ^p	2019/2018	2020/2019
Total Housing Starts	3 024.0	4 280.0	3 862.0	11 682.0	3 393.0	202.50	-71.00
Number of Housing Starts by NHT	3 024.0	3 277.0	3 665.0	8 120.0	1 503.0	121.60	-81.50
Total Housing Completions	1 420.0	1 357.0	2 417.0	2 468.0	2 607.0	2.10	5.60
Number of Housing Completions by NHT	1 323.0	1 212.0	2 214.0	2 042.0	1 719.0	-7.80	-15.80
Total Number of Mortgages	13 155.0	16 154.0	9 655.0	17 959.0	17 560.0	86.00	-2.20
Number of Mortgages by NHT	5 467.0	6 368.0	7 053.0	7 382.0	7 108.0	4.70	-3.70
Total Value of Mortgages (\$m)	39 184.8	54 309.4	50 264.0	60 362.5	68 767.0	20.10	13.90
Value of Mortgages by NHT (\$m)	17 159.4	21 345.3	28 335.0	27 592.0	30 409.8	-2.60	10.20
Commercial Bank Loans & Advances (\$m)	25 446.5	28 601.3	34 621.7	49 491.6	50 119.4	42.90	1.30
Cement Supply ('000 Tonnes)	833.2	898.5	963.8	940.2	1 051.4	-2.40	11.80
Cement Imports ('000 Tonnes)	42.0	87.6	180.9	192.4	112.2	6.40	41.70
Silica Sand Production ('000 tonnes)	19.8	22.6	24.5	28.4	29.8	15.90	4.90
Limestone Production ('000 tonnes)	2 748.1	2 911.9	3 132.4	2 902.4	2 467.0	-7.30	-15.00
Sand and Stone Production ('000 tonnes)	1 766.5	1 996.4	1 801.9	1 829.4	1 463.5	1.50	-20.00
Asphalt Sales ('000 tonnes)	15 920.0	14 881.7	23 487.2	18 662.5	12 472.5	-20.50	-33.20
Employment (annual average '000 persons)	94.7	97.8	103.5	108.0	100.0	4.30	-7.40

r – revised

p – preliminary

Source: Compiled by the Planning Institute of Jamaica

\$16 656.1 million, reflecting an increase of 4.9 per cent relative to 2019. This increase stemmed mainly from higher expenditure on road works under SCHIP, which recorded disbursements of \$8 730.5 million, an increase of \$6 853.1 million relative to 2019. The Major Infrastructural Development Programme (MIDP) recorded decreased expenditure, by \$5 919.9 million to \$7 742.8 million. The Kuwait Fund Rehabilitation Project from Tom's River to Bridgetown also recorded lower disbursements in the sum of \$182.9 million, a decline of \$122.3 million.

- The National Road Operating and Constructing Company Limited (NROCC), which expended \$3 465.1 million, an increase of \$2 328.2 million. Funds were used for Part A of the SCHIP, May Pen to Williamsfield, which commenced during the last quarter of 2019.
- Urban Development Corporation (UDC), which recorded expenditure of \$1 405.4 million compared with \$664.4 million in 2019. The Montego Bay Closed Harbour Beach Park (\$609.6 million), Hellshire Sewerage Treatment Plant Upgrading and Expansion (\$127.5 million), and Houses of Parliament Design Competition (\$596.5 million), combined, accounted for 94.9 per cent of total expenditure.

- Jamaica Social Investment Fund (JSIF), which recorded expenditure of \$2 136.6 million, an increase of 26.1 per cent relative to 2019. Funds were allocated to Infrastructure (related to storm water roads) in the amount of \$1 034.8 million, Other Buildings (related to schools, community centres, health centres, and homes for elderly/children) of \$1 095.8 million, and Utilities (relating to water sanitation) of \$6.0 million.

The disbursements for the entities recording lower capital expenditure were disaggregated as follows:

- Jamaica Public Service (JPS), with disbursements of \$7 477.0 million, declined by 38.6 per cent. This expenditure was used mainly for construction and installation activities related to the distribution of power.
- Port Authority of Jamaica (PAJ) expended \$1 989.5 million, a decrease of 59.0 per cent. Funds were used for infrastructure development (\$283.9 million, down \$1 390.8 million), construction and/or refurbishment of commercial properties (\$1 512.6 million, down \$156.1 million), docks, berths etc (\$184.1 million, down \$1 274.4 million), and other buildings (\$8.9 million, down \$44.6 million).

TABLE 14.2
CAPITAL EXPENDITURE BY INSTITUTION
(\$'MILLION)

Executing Agency	2016	2017 ^r	2018 ^r	2019 ^p	2020	2019/2018	2020/2019	
National Works Agency (NWA)	9 721.0	11 666.2	22 081.1	15 874.2	16 656.1	-28.1	4.9	Expenditure on Road Construction included the Major Infrastructure Development Project, the South Coast Highway Improvement Project (SCHIP), and the Kuwaits Fund Road Rehabilitation Project.
National Road Operating & Constructing Company (NROCC)	1 302.1	0.0	0.0	1 136.9	3 465.1	100.0	204.8	SCHIP Part A: May Pen-Williamsfield
Jamaica Public Service Company Limited (JPSCo)	5 333.9	10 269.1	12 804.9	12 169.6	7 477.0	-5.0	-38.6	Funds were utilized mainly in construction and installation activities related to the distribution of power.
Jamaica Social Investment Fund (JSIF)	642.0	757.9	874.9	1 694.4	2 136.7	93.7	26.1	These funds were expended on Infrastructure relating to storm water roads, and Other Buildings relating to the refurbishment of schools, community centres, homes for the elderly and children.
Port Authority of Jamaica (PAJ)	496.3	3 721.6	7 544.9	4 855.2	1 989.5	-35.6	-59.0	Funds were used for infrastructure development, construction and/or refurbishment of commercial properties, docks, berths etc, and other buildings.
Urban Development Corporation Limited (UDC)	732.8	386.6	186.6	664.4	1 405.4	252.3	111.5	The primary activities included the Montego Bay Closed Harbour Beach, Hellshire Sewage Treatment Plant Upgrading and Expansion, and Completion of Design Houses of Parliament

NOTES:

a – some of the the activities by the different institutions were sub-contracted and are not mutually exclusive, and therefore capital expenditure by the different institutions cannot be aggregated.

b – the Jamaican dollar equivalent is estimated using an average exchange rate (US\$1:125.14) for 2016, (US\$1:128.4) for 2017, (US\$1:129.7) for 2018, (US\$1:134.2) for 2019, and (US\$1:\$143.27) for 2020.

p – preliminary

r – revised

Source: Compiled by the Planning Institute of Jamaica from information received from various institutions

CONSTRUCTION INPUTS

Lower production was recorded for most inputs in the industry, reflecting the decreased demand associated with road construction and rehabilitation projects. Relative to 2019 less output was recorded for the following:

- Limestone, which is used in the building and construction of roads and the production of cement, declined by 15.0 per cent to 2.5 million tonnes
- Whiting production, which was 124 471 tonnes, a decrease of 24.0 per cent
- Shale recorded a decline of 23.0 per cent to 166 813 tonnes. This represented the third consecutive year of decline.
- Sand & Stone production, which declined by 20.0 per cent to approximately 1.5 million tonnes
- Marl & Fill and Clay, which declined by 37.0 per cent to 1.05 million tonnes, and 17.0 per cent to 500 tonnes, respectively.

Gypsum, Silica Sand, and Pozzolan recorded increases of 19.0 per cent to 65 847 tonnes, 5.0 per cent to 29 803 tonnes, and 27.0 per cent to 102 277 tonnes, respectively, relative to 2019.

The local supply of cement increased by 11.8 per cent to 1 051 378.9 tonnes. This reflected the net effects of an increase in cement production of 25.2 per cent to 940 003.0 tonnes, and declines in cement imports and cement exports of 41.7 per cent and 72.1 per cent, to 112 200.9 tonnes and 825.0 tonnes, respectively.

An analysis of preliminary General Consumption Tax (GCT) data revealed an increase in the sale of construction-related goods by 6.6 per cent in real terms (Table 14.3). This was driven by growth in two of the three categories. A real increase of 6.7 per cent was registered for **Retail Sale of Hardware, Construction Materials, Paint and Glass**, the heaviest weighted category (accounting for 97.4

TABLE 14.3
GROWTH IN GROSS SALES OF CONSTRUCTION INPUTS, JANUARY–DECEMBER 2020
RELATIVE TO JANUARY–DECEMBER 2019

Goods Category	%	
	Real Growth	Share of Total Sales
Wholesale of Construction Materials, Hardware, Plumbing and Heating Equipment and Supplies	35.4	0.4
Retail Sale of Hardware, Paint and Glass	-3.5	2.2
Retail Sale of Hardware, Construction Materials, Paint and Glass	6.7	97.4
Total	6.6	100.0

Source: Compiled by the Planning Institute of Jamaica with information received from Tax Administration of Jamaica

per cent of total sales), and *Wholesale of Construction Materials, Hardware, Plumbing and Heating Equipment and Supplies* increased by 35.4 per cent. *Retail Sale of Hardware, Paint and Glass* registered a real decline of 3.5 per cent.

Asphalt sales, however, declined by 33.2 per cent to 12 472 529.0 tonnes, resulting from fewer road-related construction works during the year relative to 2019.

Employment

Average employment in the Construction industry decreased from 108 000 persons in 2019 to 100 033 persons. This accounted for 8.5 per cent of the total employed labour force. This increase reflected a decline in average employment for males, by 7 867 to 96 533 persons, and for females, by 100 to 3 500 persons (see Table 14.1).

Labour Productivity: Real Value Added Per Employed Labour

There was an increase in labour productivity, as

measured by the RVA per employed person, in the construction industry by 7.1 per cent to \$555 756.6 (constant 2007 prices) compared with 2019. This was due to RVA declining by a smaller per cent than persons employed within the industry.

FINANCING TO THE INDUSTRY

Mortgage Financing

Of the financial institutions surveyed, the total value of mortgages disbursed was \$68 767.0 million, representing an increase of 13.9 per cent relative to 2019 (Table 14.4). This performance was due to higher mortgage disbursements by all categories of institutions surveyed. Commercial Banks & Building Societies⁶ increased to \$30 212.8 million, by 13.5 per cent. The NHT disbursed \$30 409.8 million, an increase of 10.2 per cent; Credit Unions disbursed \$7 608.4 million, an increase of 29.0 per cent; and disbursements by Life Insurance Companies, of \$536.0 million, represented an increase of 116.6 per cent relative to 2019.

TABLE 14.4
MORTGAGES BY MAJOR AGENCIES, 2016–2020
(\$ MILLION)

Entities	Jan–Dec 2016		Jan–Dec 2017		Jan–Dec 2018		Jan–Dec 2019 ^r		Jan–Dec 2020 ^p	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
NHT	5 467.00	17 159.40	6 368.00	21 345.30	7 053.00	28 335.00	7 382.00	27 591.98	7 108.00	30 409.80
Commercial Banks & Building Societies	1 765.00	1 7041.50	2 910.00	28 837.90	2 575.00	21 664.30	2 185.00	26 623.38	2 352.00	30 212.76
Life Insurance	29.00	261.40	35.00	330.10	27.00	264.70	26.00	247.50	38.00	536.00
Credit Union	6 229.00	2 976.20	6 841.00	3 796.10			8 366.00	5 899.60	8 062.00	7 608.40
Total	13 490.0	37 438.5	16 154.0	54 309.4	9 655.0	50 264.0	17 959.0	60 362.5	17 560.0	68 767.0

r – revised

p – preliminary

Source: Compiled by the Planning Institute of Jamaica

6. Data reported for Commercial Banks & Building Societies capture information for selected institutions only.

The total number of mortgages disbursed was 17 560 loans, a decline of 399 loans in comparison with 2019. This decrease was due mainly to fewer loans being disbursed by the NHT (7 108 loans, down 274 loans) and Credit Unions (8 062 loans, down 304 loans). Commercial Banks & Building Societies and Life Insurance Companies recorded higher volumes of loan disbursements, totalling 2 352 loans (by 167 loans) and 38 loans (by 12 loans), respectively.

Total disbursements by the Jamaica Mortgage Bank to developers in the industry was \$1 270.5 million, an increase of 39.2 per cent compared with the corresponding period of 2019.

Other Financing

The stock of Loans & Advances at Commercial Banks to the industry at the end of December 2020 was \$50 119.4 million. This reflected an increase of \$627.7 million compared with the stock at the end of December 2019.

OUTLOOK

Real Value Added for the Construction industry is projected to increase for 2021. This performance is predicated on civil engineering activities related to road infrastructure and housing programmes slated to be implemented in 2021. Upcoming projects for implementation during 2021, under MEGJC include:

— Southern Coastal Highway Improvement Project (SCHIP)

The Part A component of the project, by NROCC, will continue to advance construction works and is projecting 50.0 per cent completion at the end of 2021. For the Part B component, the NWA is to commence work on five additional packages under Part B (iii & iv):

- Package 1, from Yallahs Bridge to Loudon Hill (Salt Pond), 6.72km
- Package 2, from Loudon Hill (Salt Pond) to Pomfret, 4.90km
- Package 3, from Pomfret to Morant River Bridge, 9.55km
- Package 12, from Boston Area to Drapers, 7.44km
- Package 13, from Drapers to Port Antonio, 9.53km.

— Falmouth East Masterplan

The proposed development includes the construction of a commercial building, civic and residential buildings, and green space inclusive of recreational facilities with urban open spaces on the 50 acres of lands adjacent to the Falmouth Cruise Terminal. This project intends to supplement the historic restoration

of Falmouth to an authentic Georgian style to enhance the experience of both local and overseas visitors to the town.

— Montego Bay Perimeter Road Project

NROCC continued the preparatory work for the implementation of the Montego Bay Perimeter Road Project, which resulted in the issuance of the environmental permit in December 2020. It is expected that during 2021, the main contract for the implementation of the project will be signed and access will be provided for the construction of the Montego Bay Bypass and the Long Hill Bypass.

— Gordon Town to Papine Road Repair Works

Construction work to restore the main road leading from Gordon Town to Papine—which was made impassable at an area just beyond Cooperage, after a significant part of its embankment collapsed during heavy rainfall in November 2020—will continue under the supervision of NWA. The scope of the project includes the construction of a two-tiered 20m high retaining wall, extending along the full stretch of the breakaway and reconstruction of the failed section of the roadway; as well as drainage construction.

— Bridge Programme

The NWA will continue to carry out its Bridge Programme to include the following:

- Completion of the Mahogany Vale Bridge, St Thomas; Tiber River Bridge, St Mary; and Golden Vale Bridge, Portland
- Construction of the Pentfield Bridge, St Andrew and repairs to other bridges
- De-siltation works to improve the hydraulic efficiency of several rivers to reduce the likelihood and/or severity of fluvial flooding.

— West Lands Development

This project involves the development of 100 acres of industrial lands, bounded by the Kingston Container Terminal and the Causeway, for commercial activities. The objective is to develop the infrastructure, that is, roads, electrical, telecommunication and drainage, to facilitate logistics operations adjacent to the Port.

— Cargo Logistics Centre, Montego Bay

This project involves construction of a new warehouse on the 2.9 acres of land owned by the Port Authority of Jamaica (PAJ), adjacent to the Montego Bay Free Zone complex, to relocate the existing warehouse facility that predominantly receives imported barrels.

— Commercial Complex, Montego Bay Free Zone

The PAJ proposed the development of the 12 acres of land at the Montego Bay Free Zone into a commercial and logistics complex.

— **PAJHQ & Commercial Development of former Sardine Factory Lands, Newport East, Kingston**

The PAJ intends to develop office and commercial buildings on lands at Newport East, contiguous to the sea and having the requisite ability to house both the Harbours Department and its Head Offices. In addition, it is being proposed that construction will include additional commercial office space.

— **Infrastructure Development Projects**

The NWA has identified for consideration an infrastructure project portfolio, which comprises projects designed to address recurrent congestion; improve road safety; provide water supply and sewerage utility; and reduce vehicle-operating costs. Eight projects across Kingston & St Andrew, St. Catherine, Clarendon, Westmoreland, Hanover and St. James are being considered for inclusion in this portfolio. ■

ENERGY, ELECTRICITY & WATER¹

INTRODUCTION

The Electricity & Water Supply industry declined by 5.8 per cent compared with 2019 and represented 3.3 per cent

Real Value Added ↓ 5.8%

Electricity Consumption ↓ 7.0%

Water Supply ↓ 2.0%

of Total Real Value Added (RVA) {Figure 15A}. The lower RVA resulted from decreases of 7.0 per cent

to 3 059.8 million kilowatt hours (kWh) in electricity consumption² and 2.0 per cent to 83 126.2 megalitres in water consumption. The decline in the industry’s performance was mainly attributed to lower demand due to the negative impact of the COVID-19 pandemic and measures implemented to control its spread, which resulted in reduced commercial activities.

Total electricity generation fell by 4.6 per cent to 4 227.4 GWh, stemming mainly from a reduction of 42.8 per cent to 1 395.5 GWh in net generation by Jamaica Public Service (JPS). This decline in output by JPS outweighed an increase of 42.3 per cent to 2 831.9 GWh in generation by Independent Power Producers (IPPs). The share of total

output produced by JPS decreased from 55.1 per cent to 33.0 per cent. The share of Liquefied Natural Gas (LNG) powered thermal plants in the electricity mix increased to 58.5 per cent from 25.5 per cent in 2019.

The system heat rate³ declined by 5.8 per cent to 8 503 kilojoules per kilowatt hour (kJ/kWh). There was a reduction of 7.1 per cent to 3 034.7 GWh in electricity sales, while revenue increased by 5.8 per cent to \$125.1 billion. The number of customers increased to 673 156 from 662 177.

Water production by the National Water Commission (NWC) increased by 4.8 per cent to 333 205.2 megalitres, of which 83 126.2 megalitres (24.9 per cent) was consumed compared with 84 814.8 megalitres (26.7 per cent) in 2019. The NWC recorded an increase of 8.6 per cent to \$34.3 billion in revenue, while the number of water connections increased by 1.7 per cent to 518 199.

Global crude oil supplies fell by 6.4 per cent to 88.6 million barrels per day (mbd), resulting from lower production from Organization of Petroleum Exporting Countries (OPEC) and non-OPEC producers. World oil demand decreased by 9.8 mbd to 90.3 mbd, resulting from lower demand from the Organization for Economic Corporation and Development (OECD) and non-OECD countries. The average spot peak price of crude oil on the

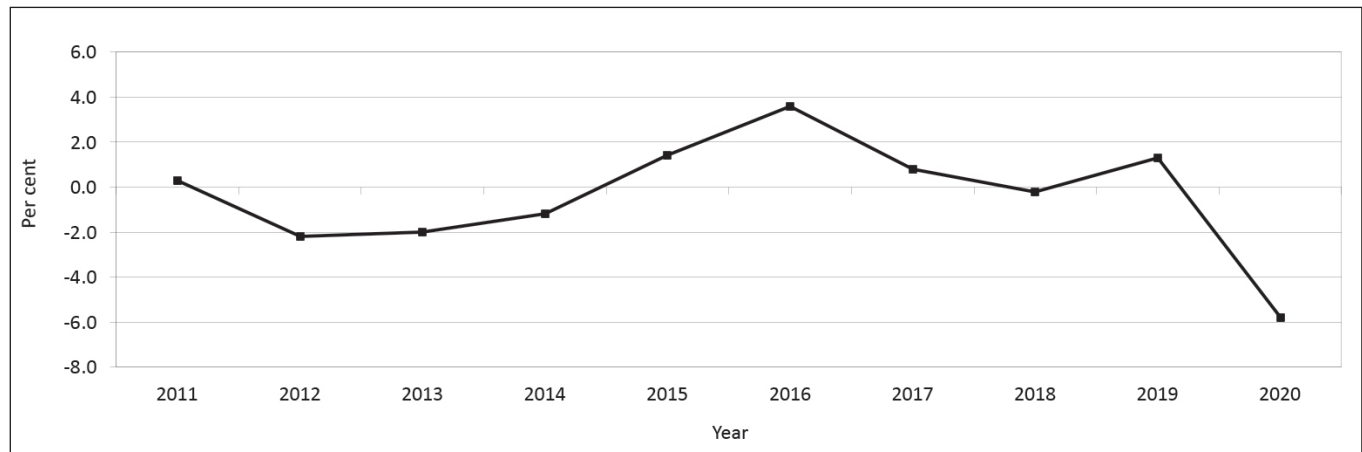


FIGURE 15A: CHANGE IN REAL VALUE ADDED FOR THE ELECTRICITY & WATER SUPPLY INDUSTRY, 2011–2020

1. Real Value Added is calculated for the electricity and water components. However, some discussion on energy is included.
2. Electricity consumption = total generation + station use - line losses.
3. Heat rate reflects the efficiency of a power plant to produce energy. It indicates the amount of fuel required to generate one unit of electricity. Therefore a higher heat rate reflects a less efficient plant.

international market declined by 32.8 per cent to US\$41.26 per barrel. On the local market, the average billing prices for most petroleum products surveyed decreased relative to 2019.

UTILITY REGULATION



OFFICE OF UTILITIES REGULATION

The Office of Utilities Regulation (OUR), in fulfilment of its mandate and in compliance with the Electricity Act, 2015 and the associated 2016 Licence, continued to support improvements within the Electricity & Water Supply industry. The main areas of focus for the electricity sector were the 2019 JPS Rate Review and the JPS's Smart Streetlight Programme. Within the water sector, the primary focus was the Tariff and Rate Regime for private water and sewerage services providers.

Electricity Sector

JPS 2019–2024 Rate Review

The OUR is required to review JPS's Electricity Tariff every five years. After its initial tariff application was rejected in July 2019, JPS resubmitted its application which the OUR accepted in December, 2019. The OUR submitted the final 2019–2024 JPS Determination Notice to the utility in December 2020, with an effective date of February, 2021.

Assessment and Monitoring of JPS's Smart Streetlight Programme (SSP)

The Electricity Licence 2016, mandated the JPS to commence a programme for the implementation of the smart light emitting diodes (LED) lighting technology. Along with this mandate, a further agreement was struck between JPS and the Government of Jamaica (GOJ) to replace the existing quantity of approximately 105 000 high-pressure sodium (HPS) streetlight fixtures with fully connected LED streetlights. The Licence also provided for the cost of the programme to be recovered through the System Benefit Fund (SBF), or another "Fund" as authorised by the OUR. As this had not yet been established, the OUR and JPS had to develop the appropriate mechanism to recover the cost associated with the programme. The Streetlight Asset Model, based on the full utility ownership, was developed and included in the 2019–2024 Rate Review Determination Notice.

Right of First Refusal (RoFR) to Replace Bogue Gas Turbine 8 (GT8) (14MW) with Distributed Generation Assets

In exercising its RoFR, the JPS planned to replace the GT8 with a new 10MW plant in St Catherine, and a 4MW plant in St Thomas. The OUR, along with the Ministry of Science Energy & Technology (MSET) and the Generation Procurement Entity (GPE), was tasked with the responsibility of determining whether JPS' proposal qualifies as a RoFR project. In March 2020, the OUR approved the Determination Notice (Operational Notice of GT8 Replacement Capacity). The no-objection was also approved for JPS and New Fortress Energy⁴ (NFE) to enter into a Gas Supply Agreement. This agreement is to facilitate the supply of Natural Gas to the 10MW component of the RoFR project, to be located at the premises of a major poultry producer in St Catherine. JPS received all the relevant permits.

Water Sector

Tariff and Rate Regime for Small Private Providers

During the year, a number of applications by providers for rate increase were processed as follows:

- **Dairy Spring Ltd** –The Determination Notice was approved by the Office and published on March 5, 2020
- **Kemtek Development & Construction Co. Ltd.** –The Determination Notice was approved by the Office and published in January 2020
- **Richmond Environmental Services Ltd. (RESL)** –The Determination Notice was approved by the Office and published in April 2020
- **Tryall Golf and Beach Club Limited (TGBC)** –The Determination Notice was approved by the Office and published in August 2020
- **Runaway Bay Water Company Limited (RBWC)** – submitted its tariff application in July 2020 and the draft Determination Notice was being prepared.

ENERGY POLICIES AND PROGRAMMES

The GOJ, through its Ministries, Departments and Agencies (MDAs), pursued policy initiatives to facilitate advancement within the energy sector. These programmes were guided by the National Energy Policy (2009–2030), which is aligned to Vision 2030 Jamaica – National Development Plan and its associated Medium Term Socio-economic Policy Framework, 2018–2021. The Strategic Electric Mobility Framework, a precursor to an electric vehicle policy,

4. New Fortress Energy is a company based in the United States of America that is responsible for the supply of LNG to Jamaica

was prepared with technical assistance from the Inter-American Development Bank. The Energy from Waste (EfW) Sub-Policy was revised and submitted to Cabinet in October, thereafter, several MDAs were asked to provide their final feedback on the Sub-Policy. As part of GOJ's Public Sector Transformation and Modernisation (PSTM) Programme, several Energy agencies such as Petroleum Corporation of Jamaica (PCJ), Petrojam Ethanol Limited and National Energy Solutions were closed, and their core functions rationalized and absorbed by Government Ministries to create a more effective public sector.

Integrated Resource Plan (IRP)

Cabinet approved the draft IRP document, which was shared with energy sector stakeholders during a three-month client engagement process. The primary objective of the IRP is the development of the electricity sector's medium to long-term plans to include planning for the next portion of power generation mix to meet Jamaica's electricity needs. Critical criteria to be fulfilled by the IRP include:

- higher renewable energy contribution which means less imported petroleum oil
- lower greenhouse gas emissions
- cost saving to customers
- more efficient generation fleet
- flexible electricity grid to handle growth scenarios
- job creation
- sustainable economic growth.

Cabinet also approved the procurement of the next portion of Generation capacity of 513.5MW to be procured by 2025, to include:

- 171.5MW equivalent of JPS replacement electricity generation capacity which may be any approved combination of conventional, firm capacity renewables and intermittent renewables technologies (Solar/Wind)
- 246.0MW–268.0MW of Solar/Wind power
- 36.0MW hydro-electric power
- 18.0MW–40.0MW of Waste to Energy electric power
- 20.0MW of Biomass electric power.

Public Sector Energy Efficiency and Conservation Programme (EECP)

The EECP, designed to raise awareness and increase energy efficiency in the public sector, was completed during the year. The final activities undertaken were as follows:

- supply and installation of energy-efficient air conditioning retrofits for three Divisions of the Jamaica Constabulary Force. This project, valued at \$126.6 million, resulted in the retrofitting of 272.2

tonnes of air conditioning capacity and the installation of 2 057.3 square metres of cool roof solutions at the May Pen Police Station, Mobile Reserve (now Special Operations) and National Police College of Jamaica

- development of a Hazardous Waste Management Manual for Energy Efficiency and Conservation Interventions in the Public Sector, under a contract valued \$3.5 million
- preparation of the EECP Knowledge, Attitude and Practices in Jamaica's Public Sector Survey, under a contract valued at \$13.4 million.

Energy Management and Efficiency Programme (EMEP)

As a result of the closure of the PCJ, the MSET, in collaboration with a number of relevant international agencies, conducted a review and re-scoping of the EMEP. These review activities included:

- individual consultancy for the design and supervision of energy efficiency and renewable energy measures
- the implementation of the Urban Traffic Management System
- consultancy service to perform a technical and socio/economic study of Total Access to Electricity in Jamaica.

Quality of Petroleum Imports

The Petroleum Regulations mandates the Bureau of Standards Jamaica (BSJ) and National Compliance Regulatory Authority (NCRA) to test samples of imported and locally produced 87 and 90 Gasolines, Automotive Diesel Oil and Ethanol before being sold to consumers. A total of 422 tests were conducted, the samples tested and passed were as follows:

- 149 imported and locally produced 87 Octane Gasoline
- 113 imported and locally produced 90 Octane Gasoline
- 93 imported and locally produced Automotive Diesel Oil
- 23 imported Ultra Low Sulphur Diesel (ULSD)
- 44 imported Ethanol.

Energy Licensing Administration

The Energy Licences Administration Office (ELAO) issued:

- 120 Net Billing Licences, an increase of 37.0 per cent compared with 2019, with a combined generating capacity of 3.1 MW. This brought the total number of Net Billing Licences issued to date to 938, with an equivalent generating capacity of 21.51 MW

- Six Auxiliary Connections Licences.
- Under the Petroleum Act and Regulations, the registrations and licences issued during the year were as follows:
 - 28 haulage contractors registered and issued with licences
 - 92 tanker drivers registered
 - 11 marketing companies were issued with licences.

Oil and Gas Exploration

In 2020, Tullow Oil Plc indicated to the GOJ its intention to exit the Walton-Morant licence⁵ at the end of its licence period. This decision was arrived at after a process to seek partners to drill an exploration well generated interest. However, less than favourable market conditions, driven largely by a collapse in oil demand due to the COVID-19 pandemic, kept plans from advancing. Subsequently, the minority interest holder, United Oil and Gas (UOG), indicated to the GOJ that it was interested in becoming the 100.0 per cent holder of the Walton-Morant licence. Cabinet approved UOG's 100.0 per cent working interest, along with an 18-month extension request beginning August 1, 2020. During the 18-month work programme, UOG is expected to provide an updated satellite seep survey, additional onshore and offshore oil sampling, wider regional petroleum systems

modelling along with a more comprehensive seismic interpretation of the Morant Basin sedimentary basin.

PERFORMANCE

International Oil Market

The spread of COVID-19 had a negative impact on the international oil market, resulting in a marked decline in global oil demand as most economies weakened. Lower demand reflected the imposition of varied restrictions globally on businesses and persons with the aim of curbing the spread of the virus. In relation to supply, the oil market was affected by a glut as suppliers had difficulty selling crude oil due to reduced demand for the product.

World oil demand fell from 100.1 mbd to 90.3 mbd (Table 15.1). All categories among the OECD and Non-OECD countries recorded lower demand (see Table 15.1).

Global oil supply was reduced by 6.1 mbd to 88.6 mbd (Table 15.2). This reduction reflected declines of 12.3 per cent to 25.7 mbd in output by OPEC producers and 3.8 per cent to 62.9 mbd by Non-OPEC producers. Among the OECD territories, lower output by North America outweighed increased output by Europe while for the Non-OECD territories, China was the only country which increased supply.

TABLE 15.1
WORLD OIL DEMAND 2016–2020
(MILLION BARRELS PER DAY)

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019 2018	2020 2019
OECD	47.0	47.7	48.0	47.8	42.0	-0.4	-12.1
Americas	24.9	25.1	25.7	25.7	22.5	0	-12.5
Europe	14.0	14.4	14.3	14.3	12.4	0	-13.3
Pacific	8.1	8.2	8.0	7.8	7.1	-2.5	-9.0
TOTAL NON-OECD	49.5	50.0	51.1	52.3	48.3	2.3	-7.6
Former Soviet Union	4.5	5.4	5.5	5.6	5.0	1.8	-10.7
Latin America	6.4	6.5	6.5	6.6	6.0	1.5	-9.1
China	12.0	12.5	13.0	13.5	13.1	3.8	-3.0
Others ^a	26.6	25.6	26.1	26.6	24.2	1.9	-9.0
TOTAL DEMAND	96.5	97.7	99.1	100.1	90.3	1.0	-9.8

a – Other Asia, Middle East, Africa, Europe

n/a – not available

n/ap – not applicable

p – preliminary

r – revised

Totals may not add up due to independent rounding

Source: OPEC

5. This licence was granted by the GOJ and permits the drilling of over 22 400 kilometres squared (km²) of offshore wells in Jamaica.

TABLE 15.2
WORLD OIL SUPPLY 2016–2020
(MILLION BARRELS PER DAY)

	2016	2017	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019 2018	2020 2019
OPEC	37.8	31.5	31.3	29.3	25.7	-6.4	-12.3
OECD Supply	23.4	25.7	28.3	30.0	29.1	6.0	-3.0
Americas	19.5	21.5	24.1	25.8	24.7	7.1	-4.3
Europe	3.5	3.8	3.8	3.7	3.9	-2.6	5.4
Asia Oceania	0.4	0.4	0.4	0.5	0.5	25.0	0.0
NON-OECD Supply	31.1	32.4	32.7	33.1	31.7	1.3	-4.3
Former Soviet Union	14.2	14.5	14.7	14.8	13.6	0.7	-8.1
Latin America	4.5	5.7	5.8	6.1	6.1	5.2	0.0
China	4.0	4.0	4.0	4.0	4.1	0.0	2.5
Others ^a	8.4	8.2	8.2	8.2	7.9	0.1	-4.1
Processing Gains	2.3	2.2	2.3	2.3	2.1	0.0	-8.7
TOTAL NON-OPEC	59.1	60.4	63.3	65.4	62.9	3.3	-3.8
TOTAL SUPPLY	96.9	91.9	94.6	94.7	88.6	0.1	-6.4

a – Other Asia, Middle East, Africa, Europe

n.a – not available

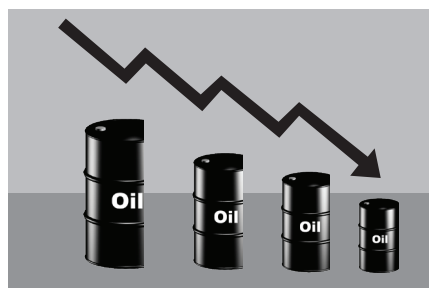
n/a – not applicable

p – preliminary

r – revised

Discrepancies in table may be due to rounding.

Source: International Energy Agency



The spot peak price of crude oil on the global market averaged US\$41.26 per barrel compared with an average of US\$61.41 per barrel in 2019.

This out-turn reflected decreased prices in all three main benchmark markets:

- UK Brent, down 33.9 per cent to US\$42.30 per barrel
- Dubai, down 33.3 per cent to US\$42.17 per barrel
- West Texas Intermediate (WTI), down 31.1 per cent to US\$39.31 per barrel.

Average monthly prices started the year at US\$61.63 per barrel in January, then declined over the next three months to reach US\$21.04 per barrel in April, after which they gradually increased to finish the year at US\$48.73 per barrel in December (Figure 15B). Compared with 2019, this price was higher only in January.

Domestic Market

Average Billing Prices

The average billing prices for most petroleum products surveyed on the local market contracted, mainly reflecting the fall in international crude oil prices. Ultra Low Sulphur Diesel Oil recorded the largest decrease in price (\$170.56 per litre to \$120.96 per litre), followed by Automotive Diesel Oil (\$160.92 per litre to \$116.10 per litre) and E10-87 (\$154.45 per litre to \$117.00 per litre). Liquid Petroleum Gas (\$46.36 per litre from \$45.18 per litre) and Fuel Oil (\$75.50 per litre from \$70.05 per litre) were the only products to record higher prices (Table 15.3).

Production

Production at the Petrojam refinery declined relative to 2019 and was attributed to the closure of the refinery during July–September 2020 to facilitate maintenance activities. Lower demand for some products, resulting from the negative impact of the pandemic, also contributed to this decline in output from the refinery. The production of most products surveyed decreased as follows:

- Heavy Fuel Oil, from 5 644 351 barrels to 5 013 788 barrels

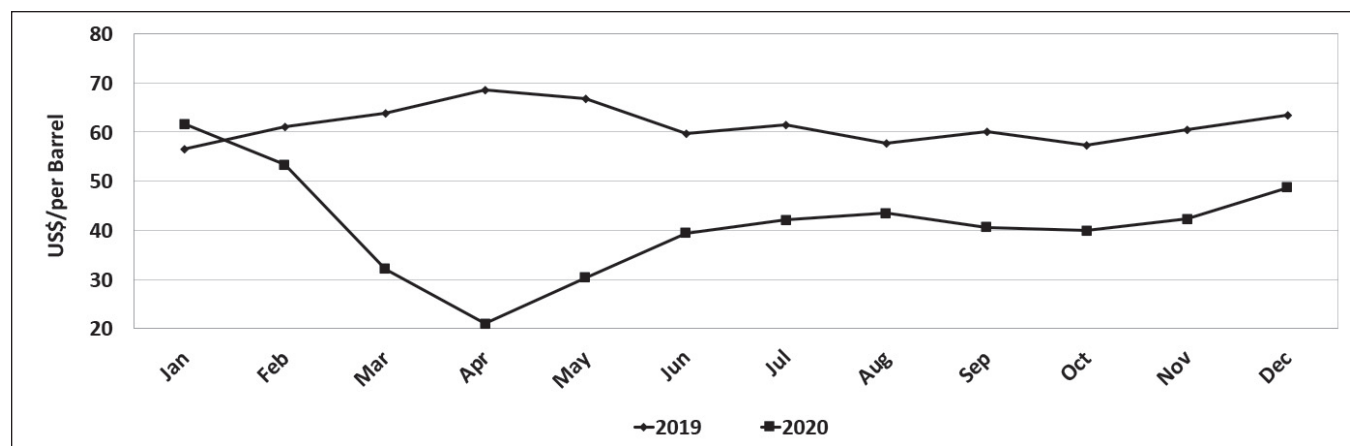


FIGURE 15B: MONTHLY AVERAGE SPOT PEAK PRICE MOVEMENTS FOR CRUDE OIL, 2019 AND 2020

TABLE 15.3
AVERAGE BILLING PRICES FOR SELECTED PETROLEUM PRODUCTS, 2016–2020
(\$/LITRE)

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019 2018	2020 2019
ADO	91.35	107.50	130.78	160.92	116.96	23.1	-27.3
Fuel Oil	40.30	63.03	79.13	70.05	75.50	-11.5	7.8
LPG	37.19	46.24	57.07	45.18	46.36	-20.8	2.6
E10 - 87	98.70	110.91	129.76	154.45	117.00	19.0	-24.2
E10 - 90	100.36	113.46	132.60	133.31	121.48	0.5	-8.9
Kerosene	82.88	91.61	112.26	114.07	93.87	1.6	-17.7
Asphalt	50.79	63.55	84.75	92.77	76.84	9.5	-17.2
ULSD	99.99	113.28	135.50	170.56	120.96	25.9	-29.1

r – revised

p – preliminary

Source: Petrojam

- E10-87, from 1 223 952 barrels to 1 112 491 barrels
- Turbo Fuel, from 485 811 barrels to 303 422 barrels
- Asphalt, from 128 613 barrels to 71 119 barrels
- LPG, from 131 697 barrels to 106 418 barrels.

However, higher production was recorded for:

- ADO, to 1 368 296 barrels from 976 479 barrels
- Naphta Solvent, to 327 barrels from 304 barrels.

Imports of Crude Oil & Petroleum Products

There was a decrease of 38.5 per cent to US\$380.1 million in the value of crude oil imports (Table 15.4a). This decline stemmed from a reduction of 26.2 per cent to US\$47.60 per cent in the average cost per barrel of crude oil, reflecting the fall in international crude oil prices. Contributing further to the decline in the value of crude oil imports was a 16.6 per cent contraction to 8.0 million barrels in the volume of crude oil imported. Brazil was Jamaica's largest supplier of

crude oil, with imports increasing by 153.8 per cent to 4.8 million barrels, followed by Colombia, which decreased supplies by 34.5 per cent to 2.9 million barrels (see Table 15.4a).

The value of refined products imported by Petrojam declined by 63.2 per cent to US\$168.69 million (Table 15.4b). Imports of petroleum products by bauxite companies declined by 45.4 per cent to US\$86.3 million, while the value of petroleum products imported by the marketing companies declined by 37.0 per cent to US\$224.0 million. The country's oil bill (total value of crude oil, refined product imports and LNG imports) decreased from US\$1 727.53 million to US\$1 073.99 million, mainly reflecting the fall in international oil prices (see Table 15.4b).

Petrojam Sales

The sale of most petroleum products surveyed decreased, due to lower demand associated with the negative impact of

TABLE 15.4A
VOLUME AND VALUE OF CRUDE OIL IMPORTS, 2018–2020

	2018 ^r		2019 ^r		2020 ^p		% Change			
	Volume ('000 Bls.)	Value ('000 US \$)	Volume ('000 Bls.)	Value ('000 US \$)	Volume ('000 Bls.)	Value ('000 US \$)	2019/2018		2020/2019	
							Volume	Value	Volume	Value
REFINERY										
Venezuelean Crude	0.0	0.0	0.0	0.0	0.0	0.0	n/ap	n/ap	n/ap	n/ap
Mexican Crude	1 049.2	67 652.8	0.0	0.0	0.0	0.0	n/ap	n/ap	n/ap	n/ap
Colombia Crude	4 497.9	312 695.5	4 503.5	291 327.5	2 947.6	126 455.8	0.1	-6.8	-34.5	-56.6
Brasil	0.0	0.0	1 908.4	128 869.7	4 844.0	246 546.7	n/ap	n/ap	153.8	91.3
USA	0.0	0.0	944.0	59 421.3	0.0	0.0	n/ap	n/ap	-100.0	-100.0
Trinidad & Tobago	0.0	0.0	320.0	16 704.9	0.0	0.0	n/ap	n/ap	-100.0	-100.0
Ecuadorean Crude	1 906.6	136 148.1	1 673.2	109 054.7	0.0	0.0	-12.2	-19.9	-100.0	-100.0
Other Crude	0.0	0.0	219.3	12 196.9	185.7	7 097.2	n/ap	n/ap	-15.3	-41.8
TOTAL CRUDE OIL	7 453.7	516 496.4	9 568.4	617 575.0	7 977.3	380 099.7	28.4	19.6	-16.6	-38.5
Average cost per barrel for crude oil (US\$)		70.62		64.50		47.60		-8.7		-26.2

Bls – Barrels

US \$ – United States Dollars

n/ap – not applicable

p – preliminary

r – revised

Source: Petrojam Refinery

TABLE 15.4B
VOLUME AND VALUE OF PETROLEUM PRODUCTS IMPORTS, 2018–2020

	2018		2019 ^r		2020 ^p		% Change 2019/2018		% Change 2020/2019	
	Volume ('000 Bls.)	Value (US\$ '000)	Volume ('000 Bls.)	Value (US\$ '000)	Volume ('000 Bls.)	Value (US\$ '000)	Volume	Value	Volume	Value
REFINERY										
Crude	7 452.6	516 496.4	9 568.8	617 574.9	7 977.3	380 099.7	28.4	19.6	-16.6	-38.5
Refined Products	6 494.2	510 040.2	6 330.5	457 805.5	3 349.1	168 693.9	-2.5	-10.2	-47.1	-63.2
Anhydrous	333.8	23 834.7	391.7	30 057.2	336.8	22 128.3	17.3	26.1	-14.0	-26.4
Sub - Total	14 280.5	1 050 371.3	16 291.0	1 105 437.6	11 663.2	570 921.8	14.1	5.2	-28.4	-48.4
MARKETING COMPANIES										
Refined Products	4 702.4	397 800.7	4 643.9	352 830.3	3 225.7	214 705.9	-1.2	-11.3	-30.5	-39.1
Anhydrous	65.1	8 877.5	22.7	2 582.0	88.4	9 280.2	-65.1	-70.9	289.5	259.4
Sub - Total	4 767.5	406 678.3	4 666.6	355 412.4	3 314.1	223 986.1	-2.1	-12.6	-29.0	-37.0
BAUXITE COMPANIES										
Bunker C	1 253.1	80 329.1	902.6	46 499.7	1 248.2	38 583.5	-28	-42.1	38.3	-17.0
Low Vanadium	1 973.2	122 777.0	2 079.1	111 642.0	1 252.7	47 764.7	5.4	-9.1	-39.7	-57.2
Sub - Total	3 310.5	211 075.1	2 981.6	158 141.7	2 500.9	86 348.2	-9.9	-25.1	-16.1	-45.4
NON-BAUXITE TOTAL										
Total Petroleum	22 358.4	1 668 124.7	23 939.2	1 618 991.7	17 478.2	881 256.1	7.1	-2.9	-27.0	-45.6
Natural Gas	1 438.7	88 378.4	1 930.7	108 533.9	4 163.5	192 731.8	34.2	22.8	115.6	77.6
GRAND TOTAL	23 797.2	1 756 503.1	25 869.9	1 727 525.6	21 641.7	1 073 988.0	8.7	-1.6	-16.3	-37.8

Bls – Barrels

n/ap – not applicable

p – preliminary

r – revised

Source: Ministry of Science Energy and Technology

COVID-19, as follows:

- Fuel Oil, from 4 453 507 barrels to 1 792 094 barrels
- E10-87, from 1 553 908 barrels to 1 191 300 barrels
- ADO, from 1 179 660 barrels to 953 051 barrels
- E10-90, from 2 330 954 barrels to 2 174 673 barrels
- LPG, from 699 574 barrels to 603 523 barrels
- Asphalt, from 117 384 barrels to 78 450 barrels
- ULSD, from 475 343 barrels to 450 399 barrels.

However, the sale of Kerosene increased to 28 046 barrels from 17 920 barrels.

New Fortress Energy (NFE) Sales

The sale of LNG increased by 115.6 per cent to 4.2

million barrels, due to efforts within the electricity sector to replace heavy fuel oil with cleaner fuel for large thermal plants. The plants which facilitated these fuel conversion efforts were the 194 MW Old Harbour LNG Plant, the 94 MW Jamalco Combined Heat and Power Plant, other commercial plants.

Energy Consumption

Compared with 2019, Jamaica's total energy consumption decreased by 18.3 per cent to 18.4 million Barrel of Oil Equivalent (BOE) {Table 15.5}. This contraction stemmed from a decline of 23.8 per cent to 15.8 million BOE in consumption from Petroleum Based

TABLE 15.5
JAMAICA'S TOTAL ENERGY CONSUMPTION, 2016–2020

ENERGY SOURCE	UNIT OF MEASURE	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
							2019 2018	2020 2019
PETROLEUM BASED								
	('000 Barrels)							
Aviation Gasoline	"	0	1	2	2	1	0.0	-50.0
Turbo Fuel	"	2 680	519	742	1 722	806	132.1	-53.2
LPG	"	1 077	1 152	1 143	1 181	1 069	3.3	-9.5
Kerosene	"	9	9	15	19	28	26.7	47.4
E10-87	"	2 203	2 109	2 113	2 054	1 746	-2.8	-15.0
E10-90	"	2 256	2 363	2 662	2 943	2 667	10.6	-9.4
ADO	"	2 490	1 610	1 706	1 623	1 307	-4.9	-19.5
ADO Bunker	"	425	183	330	343	113	3.9	-67.1
Fuel Oil	"	9 272	9 597	10 240	10 611	7 865	3.6	-25.9
Ultra Low Sulphur Diesel	"	397	1 707	1 755	889	612	-49.3	-31.2
Low Sulphur Diesel	"	n/ap	n/ap	n/ap	109	278	n/ap	155.0
TOTAL PETROLEUM	"	20 809	19 250	20 708	21 496	16 492	3.8	-23.3
TOTAL PETROLEUM - BARRELS OF OIL EQUIVALENT (BOE)		20 085	18 546	19 986	20 740	15 806	3.8	-23.8
ALTERNATIVE ENERGY								
Natural Gas	MWh	n/a	820	948	1 151	2 481	21.4	115.6
	('000 BOE)	n/a	508	587	713	1 537	21.5	115.6
Hydropower	MWh	119	154	179	155	136	-13.4	-12.3
	('000 BOE)	74	96	111	96	84	-13.5	-12.5
Wind	MWh	207	289	302	272	280	-9.9	2.9
	('000 BOE)	128	179	187	169	174	-9.6	3.0
Solar ^a	MWh	15	44	46	90	124	95.7	37.8
	('000 BOE)	9	27	28	56	77	100.0	37.5
Coal	('000 Tonnes)	97	84	79	85	91	7.6	7.1
	('000 BOE)	491	425	398	427	457	7.3	7.0
Bagasse - BOE	"	487	334	265	325	266	22.6	-18.2
ALTERNATIVE ENERGY - BOE	('000 BOE)	1 189	1 569	1 576	1 786	2 595	13.3	45.3
TOTAL PETROLEUM & ALTERNATIVE ENERGY	('000 BOE)	21 274	20 115	21 562	22 526	18 401	4.5	-18.3

a – 2016 was the first year consumption of solar energy was measured

n/a – not available

n/ap – not applicable

p – preliminary

r – revised

BOE – Barrel of Oil Equivalent

Source: Ministry of Science Energy and Technology

TABLE 15.6
PETROLEUM CONSUMPTION BY ACTIVITY, 2016–2020
(BARRELS)

ACTIVITY	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019/2018	2020/2019
Road & Rail Transportation	6 356 077	6 238 758	6 782 276	7 117 870	6 391 072	4.9	-10.2
Shipping	1 839 136	2 038 265	3 026 620	3 870 101	4 049 863	27.9	4.6
Aviation	2 680 350	1 707 883	1 757 129	1 724 051	612 512	-1.9	-64.5
Cement Manufacture	22 335	44 199	34 874	12 483	15 952	-64.2	27.8
Electricity Generation	5 634 458	6 242 217	6 149 338	6 400 280	5 963 625	4.1	-6.8
Bauxite/Alumina Processing	2 825 028	2 868 898	3 034 335	2 915 147	2 372 704	-3.9	-18.6
Sugar Manufacturing	15 815	16 576	27 734	20 040	14 223	-27.7	-29.0
Residential	1 085 692	1 160 873	1 158 915	1 200 400	1 097 230	3.6	-8.6
Petroleum Refining	333 916	364 419	333 307	346 477	317 698	4.0	-8.3
Other Manufacturing	17 162	20 829	22 589	52 262	38 558	131.4	-26.2
Other	128 834	124 629	136 132	94 299	43 999	-30.7	-53.3
TOTAL	20 938 803	20 827 546	22 463 249	23 753 410	20 917 436	5.7	-11.9

p – preliminary
r – revised

Source: Ministry of Science, Energy & Technology

sources which outweighed a 45.3 per cent increase to 2.6 million BOE in consumption from Alternative Energy sources. The fall in use of Petroleum Based sources reflected a reduction in usage of all sources, with the exception of Ultra Low Sulphur Diesel and Kerosene. The increase in use of Alternative Energy sources was driven by higher usage of Natural Gas, Solar and Coal (see Table 15.5).

There was a reduction in petroleum consumption by

activity, reflecting lower consumption for all activities, except Cement Manufacture and Shipping (Table 15.6). The increase in Cement Manufacture may be attributed to the increased activities in the construction industry in the latter half of the year.

Petroleum consumption by products decreased due to lower demand (Table 15.7). For most products, the change in consumption was in accordance with the activities to

TABLE 15.7
PETROLEUM CONSUMPTION BY PRODUCT, 2016–2020
(BARRELS)

PRODUCT	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019/2018	2020/2019
Aviation Gasoline	247	1 270	1 657	1 660	793	0.2	-52.2
Turbo Fuel	2 680 103	1 706 613	1 755 472	1 721 788	611 719	-1.9	-64.5
E10 - 87	2 202 617	2 108 759	2 113 120	2 054 049	1 745 896	-2.8	-15.0
E10 - 90	2 255 572	2 362 862	2 662 007	2 942 654	2 666 610	10.5	-9.4
Kerosene	8 583	9 105	15 437	19 162	28 081	24.1	46.5
ADO	2 489 779	1 609 669	1 706 279	1 622 606	1 306 679	-4.9	-19.5
ADO Bunker	222 253	182 871	329 942	342 566	113 027	3.8	-67.0
Ultra Low Sulphur Diesel	396 509	519 163	741 504	888 868	806 014	19.9	-9.3
Heavy Fuel Oil	16 920	60 883	57 161	714 323	1 131 742	1 149.7	58.4
Fuel Oil (Bunker C)	7 902 467	8 212 207	8 764 268	8 522 684	5 833 923	-2.8	-31.5
Fuel Oil (Low Vanadium)	1 352 725	1 323 893	1 418 971	1 374 410	899 324	-3.1	-34.6
LPG	1 077 109	1 151 768	1 143 478	1 181 238	1 069 149	3.3	-9.5
Lubricants	8 242	7 215	2 193	1 850	1 476	-15.6	-20.2
Asphalt	117 454	116 983	154 590	150 188	88 278	-2.8	-41.2
Natural Gas	103 267	1 214 065	1 420 647	1 912 326	4 108 623	34.6	114.8
Low Sulphur Oil	-	-	-	108 600	278 157	-	156.1
TOTAL	20 833 847	20 587 326	22 286 726	23 558 972	20 689 491	5.7	-12.2

r – revised
p – preliminary

Source: Ministry of Science Energy and Technology

which they are related, such as:

- Turbo Fuel and Aviation Gasoline with Aviation
- E10-90, E10-87 and Automotive Diesel Oil (ADO) with Road & Rail Transportation
- Natural Gas and ADO with Electricity Generation
- Fuel Oil, ADO Bunker and Ultra Low Sulphur Diesel with Shipping
- Liquid Petroleum Gas with Residential (see Tables 15.6 and 15.7).

These out-turns reflected the adverse impact of COVID-related measures on transportation (air, land and sea).

ELECTRICITY

Generating Capacity

Jamaica's average available generating capacity decreased by 9.1 per cent to 1 104.9 megawatts (MW) compared with 2019 (Table 15.8). This reduction in capacity resulted from the retirement of the Old Harbour Power Plant.

The proportion of electricity produced from renewable energy resources increased to 13.0 per cent from 12.0 per cent and accounted for 17.0 per cent of total generation capacity.

TABLE 15.8
JPS: GENERATING CAPACITY, OUTPUT, HEAT RATE & FUEL CONSUMPTION, 2016–2020

	UNIT	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
							2019/2018	2020/2019
GENERATING CAPACITY	MW	902.8	939.9	981.4	1 215.4	1 104.9	23.8	-9.1
Steam		292.0	249.8	262.0	262.0	68.5	0.0	-73.9
Hydro		29.1	29.4	28.7	28.7	28.7	0.1	-0.1
Wind		n/ap	n/ap	n/ap	3.0	3.0	n/ap	0.0
Slow Speed Diesel		40.0	39.2	40.0	40.0	40.0	0.0	0.0
Gas Turbine		279.5	244.0	271.5	271.5	271.5	0.0	0.0
Independent Producers	MW	262.2	377.5	379.2	610.2	693.3	60.9	13.6
Wartsilla		124.4	124.2	124.4	124.4	124.4	0.0	0.0
WKPP		65.5	65.0	65.5	65.5	65.6	0.0	0.2
Jamalcoa		11.0	11.0	11.0	11.0	-	0.0	-
JPPC		61.3	61.3	60.0	60.0	60.0	0.0	0.0
WIGTON		62.0	62.0	62.0	62.0	62.0	0.0	0.0
Blue Mountain Renewables (Wind)		36.0	34.0	36.3	36.3	36.3	0.0	0.0
WRB Solar		20.0	20.0	20.0	20.0	20.0	0.0	0.0
SJPC					194.0	194.0		0.0
NFE					-	94.0		-
Eight Rivers					37.0	37.0		0.0
NET OUTPUT	GWh	2 557.2	2 535.8	2 560.4	2 439.5	1 395.5	-4.7	-42.8
Steam		1 385.7	1 173.5	1 096.3	944.8	208.9	-13.8	-77.9
Renewables		118.9	156.8	179.2	155.2	135.6	-13.4	-12.6
Slow Speed Diesel		282.5	293.2	258.3	284.7	250.8	10.2	-11.9
Gas Turbines		770.0	912.4	1 026.7	1 054.9	800.2	2.7	-24.1
NON-JPS SOURCES	GWh	1 792.1	1 827.3	1 795.1	1 990.0	2 831.9	10.9	42.3
TOTAL OUTPUT	GWh	4 349.3	4 363.1	4 355.5	4 429.5	4 227.4	1.7	-4.6
CONSUMPTION	GWh	3 196.8	3 226.4	3 230.3	3 291.4	3 059.8	1.9	-7.0
TOTAL SYSTEM HEAT RATE	KJ/kWh	9 563	9 089	8 954	9 022	8 503	0.8	-5.8
TOTAL FUEL CONSUMPTION	000 Barrels	4 188.1	3 018.8	2 788.1	2 578.2	895.9	-7.5	-65.3
TOTAL FUEL COST	\$' 000	25 258 835	23 809.8	27 951.1	24 751.5	6 461.7	-11.4	-73.9

r –revised

p –preliminary

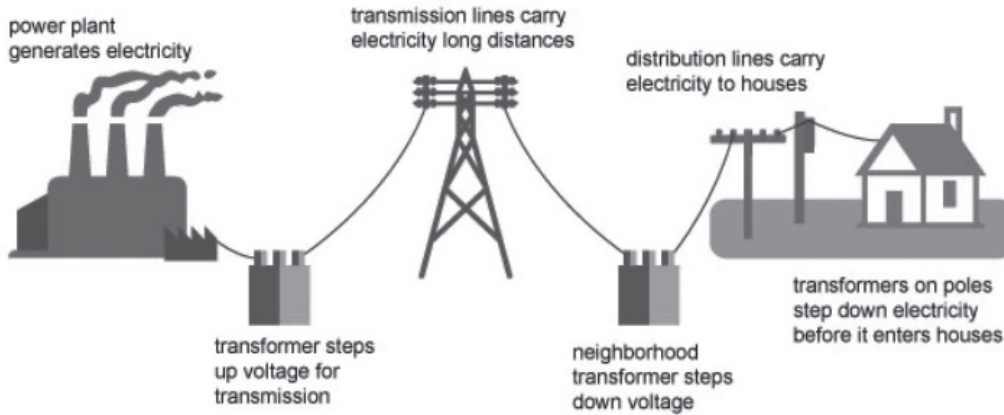
Generation

The amount of electricity generated was 4 227.4 million kWh, a decline of 4.6 per cent relative to 2019 (see Table 15.8).

Heat Rate, Fuel Consumption and Fuel Cost

Total system heat rate decreased from 9 022 kJ/kWh to 8 503 kJ/kWh, reflecting increased efficiency in the operation of power plants. Fuel consumption declined by 65.3 per cent to 895.9 thousand barrels, due mainly to the retirement of power plants and reduced output from JPS. Consequently, total fuel cost fell by 73.9 per cent to \$6.5 billion (see Table 15.8).

Electricity generation, transmission, and distribution



Source: Adapted from National Energy Education Development Project (public domain)

This decrease in output stemmed from a reduction of 42.8 per cent to 1 395.5 million kWh in generation by JPS, which outweighed an increase of 42.3 per cent to 2 831.9 million kWh in output by IPPs. The decline in electricity generation was due mainly to the negative impact of COVID-19 and the associated measure implemented by the government to curtail the spread of the virus. These measures resulted in reduced business hours and therefore lower electricity demand for commercial operations.

Electricity Disposal & Revenue

Total electricity sales reduced by 7.1 per cent to 3 034.7 million kWh, accounting for 71.8 per cent of total generation compared with 73.8 per cent in 2019 (Table 15.9). Line Losses increased by 2.7 per cent to 1 184.8 million kWh, representing 28.0 per cent of total generation compared with 26.0 per cent in 2019. Company Use, which decreased from 8.4 million kWh to 7.9 million kWh, accounted for the remainder of total generation.

The reduction in electricity consumption reflected lower sales to most customer categories, with Large Power Service recording the largest absolute decrease in sales (see Table 15.9). Residential was the only category to record increased

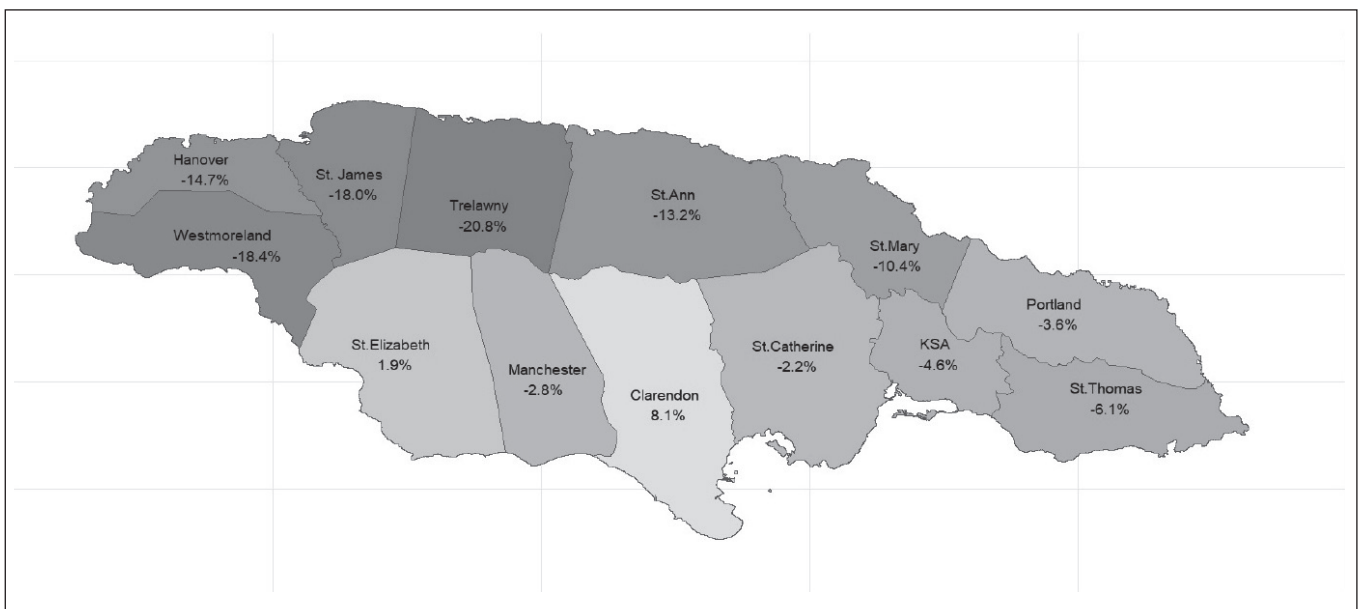


FIGURE 15C: CHANGE IN ELECTRICITY CONSUMPTION BY PARISH RELATIVE TO 2019

TABLE 15.9
JPS: SALES & REVENUE, 2016–2020

	Unit	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	2019/2018	%Change 2020/2019
DISPOSAL OF ELECTRICITY								
Sales:	GWh	3 173.4	3 199.0	3 201.8	3 267.0	3 034.7	2.0	-7.1
Residential Rate 10		1 078.7	1 069.3	1 066.2	1 100.7	1 138.6	3.2	3.4
General Service Rate 20		592.2	590.1	592.1	610.6	549.5	3.1	-10.0
Power Service Rate 40		780.1	782.2	797.2	808.3	737.3	1.4	-8.8
Large Power Rate 50		626.0	572.3	355.5	371.3	331.9	4.4	-10.6
Street Lighting Rate 60		71.3	68.3	62.4	59.4	51.5	-4.8	-13.3
Largest Power Rate 70			74.7	293.9	294.2	225.8	0.1	-23.2
Other (a)		25.0	42.3	34.5	22.5	0.0	-33.6	-100.0
Company use	GWh	10.4	9.9	9.8	8.4	7.9	-14.3	-6.0
Line Losses	GWh	1 165.6	1 154.1	1 144.0	1 153.5	1 184.8	0.8	2.7
REVENUE	\$ '000	88 571 663	105 113 341	116 905 494.0	118 266 983.0	125 085 349.0	1.2	5.8
Residential Rate 10		34 444 651	39 126 136	43 068 264	43 429 781	50 909 304	0.8	17.2
General Service Rate 20		18 485 445	22 386 165	24 713 128	24 925 654	25 247 478	0.9	1.3
Power Service Rate 40		18 132 322	22 676 404	25 885 486	26 192 584	26 812 815	1.2	2.4
Large Power Rate 50		12 958 976	15 084 038	10 602 464	10 871 758	10 155 793	2.5	-6.6
Street Lighting Rate 60		2 510 308	2 836 342	2 793 134	2 684 662	2 524 858	-3.9	-6.0
Largest Power Rate 70		n/ap	1 917 474	8 345 498	8 305 320	7 649 153	-0.5	-7.9
Other		2 039 960	1 086 783	1 497 519	1 857 224	1 785 948	24.0	-3.8

a- Includes other generating and other operating revenues.

p- preliminary

r- revised

Source: Jamaica Public Service

sales, which may be attributed to stay-at-home measures implemented by the government to stem the spread of COVID-19. The largest decline in sales was recorded by Trelawny, followed by Westmoreland and St James (Figure 15C). Kingston & St Andrew (KSA) continued to record the largest share of sales (37.2 per cent), followed by St James (11.5 per cent) and St Catherine (10.7 per cent).

JPS' total revenue grew by 5.8 per cent to \$125.1 billion. This growth in revenue may be attributed to increases in customer base and rates charged. The reduction in revenue from the categories Large Power and Largest Power may be associated with downtimes experienced by these customers due to the curfew measures introduced to stem the spread of the virus.

Average Consumption and Average Charges

The utility's customer base expanded by 10 979 to 673 156 customers, driven by an increase in all customer categories, with the Residential category recording the largest growth

in customer base (by 10 291 to 601 950 customers) {Table 15.10}. This growth in customer base was partly attributed to an increase in the housing stock.

The average consumption of most customer categories declined, due to a decrease in business hours associated with the negative impact of COVID-19. Residential customers was the only category to record an increase in consumption. The average rate charged to all customer categories increased and may be attributed to a fall in the foreign exchange rate (see Table 15.10).

WATER

Policies and Programmes

Guided by the goals and initiatives expressed in the Vision 2030 Jamaica – National Development Plan and the associated Medium Term Socio-Economic Framework 2018–2021, activities continued in the water sector during the year. Most of the activities were negatively impacted

TABLE 15.10
JPS- AVERAGE NO: CUSTOMERS, KWH USED, RATES CHARGED, 2016–2020

	UNITS	2016 ^f	2017 ^f	2018 ^r	2019 ^f	2020 ^p	% Change	
							2019/2018	2020/2019
RESIDENTIAL - Rate 10								
Customers		553 862	566 875	579 165	591 659	601 950	2.2	1.7
Kwh used	000/KWH	1 947.6	1 886.3	1 841.0	1 860.0	1 892.0	1.0	1.7
Rate charged	Cents/kWh	3 193.1	3 659.1	4 040.0	3 946.0	4 471.0	-2.3	13.3
GENERAL SERVICE - Rate 20								
Customers		63 520	65 055	66 736	68 017	68 666	1.9	1.0
Kwh used	000/KWH	9 323.0	9 070.4	8 871.6	8 977.2	8 002.4	1.2	-10.9
Rate charged	Cents/kWh	3 121.5	3 793.8	4 174.1	4 082.2	4 594.7	-2.2	-12.6
POWER SERVICE - Rate 40								
Customers		1 780	1 808	1 835	1 850	1 869	0.8	1.0
Kwh used	000/KWH	438 277.4	432 706.6	434 481.1	436 918.5	394 619.8	0.6	-9.7
Rate charged	Cents/kWh	2 324.3	2 899.2	3 246.9	3 240.3	3 636.4	-0.2	12.2
LARGE POWER - Rate 50								
Customers		153	155	142	144	148	1.4	2.8
Kwh used	000/KWH	4 093 902.6	3 692 064.3	2 511 042.8	2 575 411.7	2 244 801.9	2.6	-12.8
Rate charged	Cents/kWh	2 070.0	2 635.8	2 982.2	2 928.1	3 060.3	-1.8	4.5
STREET LIGHTING - Rate 60								
Customers		433	456	484	482	498	-0.4	3.3
Kwh used	000/KWH	164 791.1	149 810.0	128 951.9	123 250.9	103 505.0	-4.4	-16.0
Rate charged	Cents/kWh	3 520.8	4 152.0	4 474.5	4 517.5	4 898.3	1.0	8.4
LARGEST POWER - Rate 70								
Customers			23	23	23	25	0.0	8.7
Kwh used	000/KWH		3 245 739.4	12 777 738	12 746 687.0	9 184 937.0	-0.2	-27.9
Rate charged	Cents/kWh		2 568.5	2 839.7	2 822.7	3 387.6	-0.6	20.0
OTHER GENERATING COMPANIES								
Customers		2	2	2	2	-	0.0	-100
Kwh used	000/KWH	12 486 501.8	21 131 883.5	17 250 657.0	11 467 234.0	-	-33.5	-100
Rate charged	Cents/kWh	1 639.8	813.3	2 600.0	2 530.0	4 192	-2.7	65.7
Total number of customers		619 750	634 351	648 386	662 177	673 156	2.1	1.7

Customers are represented as a 12 month average

p- preliminary

r- revised

Source: Jamaica Public Service

by the COVID-19 pandemic, particularly those regarding public education campaigns and field trips. Nevertheless, progress was made on a number of projects carried out by the Ministry of Economic Growth & Job Creation (MEGJC), National Water Commission (NWC), Rural Water Supply Limited (RWSL) and Water Resources Authority (WRA).

The National Water Sector Policy and Implementation Plan (NWSP)

The objective of the National Water Sector Policy & Implementation Plan (NWSP), 2019 is to guide the provision of universal access to safe, potable water and sewerage services to all Jamaicans by 2030. During 2020, the MEGJC undertook several initiatives aimed at highlighting the measures outlined in the NWSP,

as well as increasing and maintaining communication with the public on issues affecting the water sector. One such initiative was the hosting of an interactive Virtual Information Session in partnership with key stakeholders on pertinent issues such as water and health, rainwater harvesting and drought mitigation. Additionally, three radio advertisements were developed highlighting water conservation and reuse.

The Cabinet approved the formation of the Integrated Water Resources Management Council (IWRMC) a multi-disciplinary and multi-sectoral body led by the MEGJC that seeks to facilitate broad-based consultation among key stakeholders on matters relating to water resources. The Drought Management Committee (DMC), a sub-committee of the IWRMC, met to review and revise the existing Drought Management Plan (DMP) which is now outdated.

The Ministry also initiated work on consultancies to:

- undertake a legislative review and gap analysis in support of an Integrated Water Resources Management Approach and draft legislation to support the implementation of the NWSP. This initiative, being undertaken in partnership with the United Nations Development Programme, is expected to provide recommendations to address the legislative gaps within the water sector as well as develop draft legislations
- update the NWSP Implementation Plan and the Monitoring and Evaluation Framework. This activity, being supported by the Inter-American Development Bank, is intended to advance the Plan that will be acceptable to all stakeholders and facilitate the achievement of the Sustainable Development Goals.

The NWC installed the Supervisory Control and Data Acquisition System (SCADA) valued at US\$3.0 million. This computer-based system is used for the remote control, monitoring and real time data gathering of NWC's key water works infrastructure within Kingston & St Andrew.

The WRA, consistent with its mandate to manage, protect and control the allocation and use of the country's water resources, advanced work on the preparation of a Water Resources Master Plan to provide guidance on the distribution availability and usage of water, as well as the projected impacts of climate change on water resources. The second draft of the Plan was completed in August 2020 and submitted to stakeholders for comments. Other activities carried out by the Authority related to:

Improvement to the Hydromet Network: The Authority continued work on improving its Hydromet Network with the completion of infrastructure upgrade to 12 gauging stations under the Pilot Programme for Climate Resilience (PPCR) project and the expansion of the real-time data

platform. Under the PPCR project, old gauge houses were replaced with modern and more durable ones, which improved security against theft and are more resilient to weather conditions and possible damage from rivers. The WRA added three stations to its real-time platform as part of efforts to have all reporting via this medium provide up-to-the-minute data that can be immediately accessed for analysis.

- *Aquifer Protection Zones (APZ) Studies on the Lower Rio Cobre Alluvium Aquifer and the Essex Valley sub-WMU Limestone Aquifer.*
 - The Lower Rio Cobre Alluvium study was conceptualized to determine the baseline water quality of the aquifer. This study involved the sampling of groundwater in selected wells within the APZ over a period of 12 months, and analysing the trends and conditions observed. The study concluded that water quality within the wells monitored was at an early stage of deterioration, with some impacts from saline intrusion, at least one instance of pesticide occurrence, and relatively minor impacts from sewage (measured from nitrate contamination).
 - The Essex Valley study was conceptualized to provide a complementary observation of groundwater quality in the Limestone Aquifer underlying the JISCO Alumina Refinery (Alpart) in Nain, St Elizabeth. There was documented evidence of contamination from alumina production via high pH and sodium concentrations in the region, and Alpart was required to take monthly measurements of water quality data for monitoring purposes. The WRA's study focused on wells within the basin to further correlate with the data submitted by the refinery to better understand the current water quality trends within the aquifer and to potentially establish a Water Quality Control Zone therein.
 - *Dye Tracing :* The WRA had implemented several dye trace injections to re-verify historical traces and establish new connections. A new dye-trace injection was done in October 2020 at Blue River Sink, Pedro River and McDowell Spring in St Ann to examine potential connections between these sinks, Roaring River and the Rio Cobre.

In keeping with the overall goal of the NWSP to provide universal coverage, several water supply projects were initiated, continued and completed during the year (Table 15.11). New water supply systems commissioned included Cascade in Hanover; Non Pariel in Westmoreland; and

TABLE 15.11 WATER PROJECTS, 2020				
PROJECTS	OBJECTIVES/DESCRIPTION	STATUS	EXPENDITURE	IMPACT (Persons)
Hounslow Water Supply Project, St Elizabeth	To upgrade water supply from i) Williamsfield to Barbury Hall – Phase 3A) and ii) Williamsfield to Hopewell – Phase 3B)	Complete	\$75.0 million	7 500 persons
Queen of Spain Valley Water Supply, Trelawny	Wakefield to Bunkers Hill Pipeline Replacement,	Complete	\$100.0 million	5 000 persons
Catchment Tank Rehabilitation Programme	Approximately 20 catchments tanks in Manchester and St Ann were refurbished and put into operation	Complete	n/a	n/a
Rainwater Harvesting Rehabilitation Programme	30 schools throughout the island have benefited from the establishment of rainwater harvesting facilities since the inception of the Programme	Complete	n/a	3 500
South Coast Improvement Project (SCHIP) – pipeline replacement component	To supply pipe materials and undertake pipe replacement works associated with the SCHIP in Portland & St Thomas.	Construction works commenced on first five packages.	n/a	75 000 persons
n/a– not available				

Source: National Water Comission, Rural Supply Limited

Ham Walk/Redwood in St Catherine. Extension of several systems were commissioned in Hopewell, St Elizabeth; Windsor Castle and Kildare, Portland; Wakefield, Trelawny; and Richard Hall, St Catherine. Approximately 40 000 customers benefited from the improved service delivery.

PERFORMANCE

Water Production

The NWC encountered a number of challenges in the execution of its operations which were exacerbated by the

pandemic. Among these challenges were:

- increased trucking of water
- accessing supplies in a timely manner, for example, lab consumables
- ensuring that water quality standards were maintained
- decreased revenue collection, particularly from commercial customers
- the ability to satisfy demand with more persons being at home during the day, particularly in areas where service levels were very low.

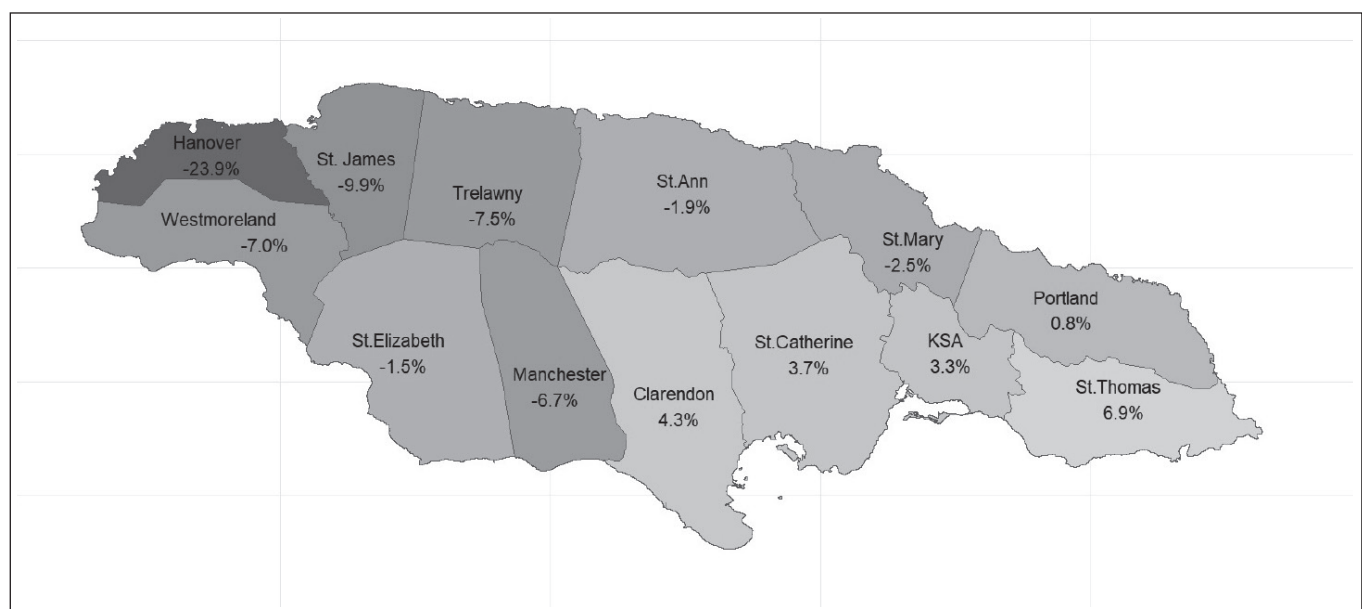


FIGURE 15D: CHANGE IN WATER CONSUMPTION BY PARISH IN 2020 RELATIVE TO 2019

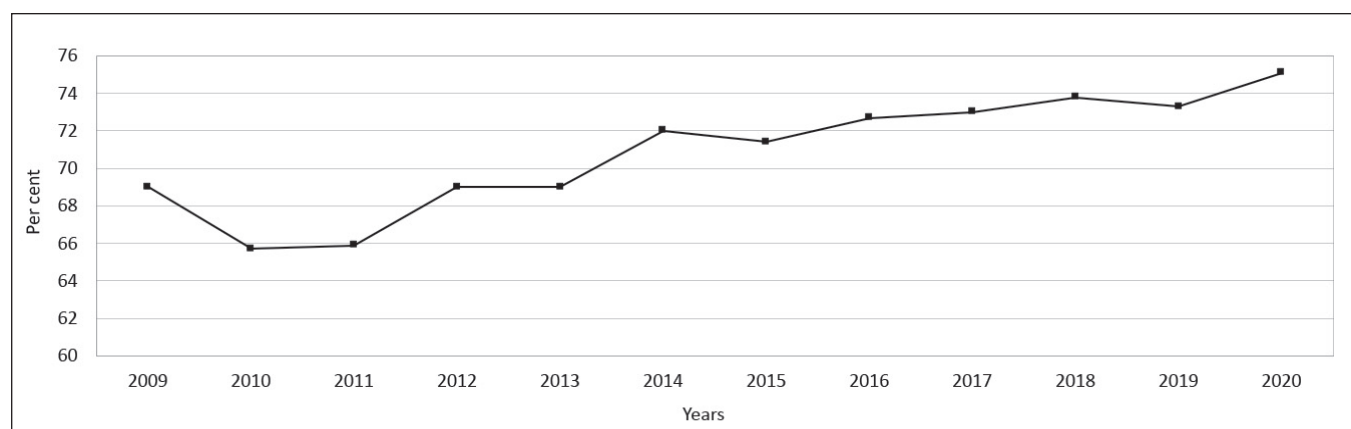


FIGURE 15E: NON-REVENUE WATER AS A PER CENT OF TOTAL PRODUCTION, 2009 - 2020

TABLE 15.12
DATA ON DOMESTIC WATER, 2016–2020

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p	% Change	
						2019/2018	2020/2019
Amount of Water Produced (Megalitres.)	317 060.1	321 688.8	326 978.6	317 832.4	333 205.2	-2.8	4.8
Kingston/St Andrew/St Thomas	74 454.6	81 669.6	75 956.3	69 511.9	71 798.8	-8.5	3.3
Other Parishes	242 605.5	240 019.2	251 022.4	248 320.5	261 406.3	-1.1	5.3
CONSUMPTION* (Megalitres.)	86 460.1	86 825.4	85 768.1	84 814.8	83 126.2	-1.1	-2.0
Kingston/St Andrew/St Thomas	32 508.7	33 302.1	32 517.0	30 470.1	31 543.9	-6.3	3.5
Other Parishes	53 951.4	53 523.2	53 251.2	54 344.7	51 582.2	2.1	-5.1
NO. OF CONNECTIONS	482 635	491 361	500 953	509 383	518 199	1.7	1.7
Kingston/St Andrew/St Thomas	131 027	134 597	136 902	140 226	141 068	2.4	0.6
Other Parishes	351 608	356 764	364 051	369 157	377 131	1.4	2.2
Revenue (\$M)	26 434.6	29 574.4	32 396.4	31 563.4	34 286.2	-2.6	8.6
Kingston/St Andrew/St Thomas	10 426.5	11 902.0	12 403.7	11 709.5	13 747.9	-5.6	17.4
Other Parishes	16 008.1	17 672.4	19 992.8	19 853.9	20 538.3	-0.7	3.4

p – preliminary

r – revised

Source: National Water Commission

In response to the negative impact of the pandemic, the NWC initiated the COVID-19 Assistance Programme, which involved a suspension of the company's disconnection policy and a waiver on late fee payment to its customers.

Water production by the NWC increased by 4.8 per cent to 333 205.2 megalitres relative to 2019 (Table 15.12). This expansion in water production should be viewed against the background of drought conditions which affected sections of the island during 2019, and led to the imposition of water restrictions islandwide by the NWC as a conservation measure.

The growth in water production reflected increases of

3.3 per cent to 71 798.8 megalitres in output from Kingston, St Andrew & St Thomas and 5.3 per cent to 261 406.3 megalitres in output from Other Parishes (see Table 15.12). The majority of the parishes in the category, Other Parishes, recorded higher water production compared with the previous year, with St Catherine registering the largest increase (74 931.2 megalitres from 67 825.9 megalitres), followed by Trelawny (21 332.2 megalitres from 19 777.9 megalitres).

Water consumption, however, declined by 2.0 per cent to 83 126.2 megalitres compared with 2019. This reflected a decrease of 5.1 per cent to 51 582.2 megalitres

in consumption in Other Parishes, which outweighed an increase of 3.5 per cent to 31 543.9 megalitres in consumption in Kingston, St Andrew & St Thomas (Figure 15D). This reduction in water consumption may be attributed to lower demand by non-residential customers, due to business closures and reduced operating hours associated with measures implemented to stem the spread of COVID-19. The overall decline in water consumption resulted from lower usage in the following customer categories:

- Commercial (from 19 289.4 megalitres to 15 519.3 megalitres)
- Schools (from 2 836.5 megalitres to 2 170.3 megalitres)
- Condominium (from 1 154.3 megalitres to 1 079.8 megalitres).

However, a further reduction in consumption was tempered by higher usage in the following categories:

- Residential (to 59 304.2 megalitres from 55 808.4 megalitres)
- Government (to 5 500.8 megalitres from 5 484.7 megalitres)
- Employee (to 253.0 megalitres from 241.6 megalitres).

The increase in consumption recorded by the category Residential may be attributed to stay-at-home measures implemented by the government to stem the spread of the virus.

Of the total water produced, approximately 75.1 per cent was non-revenue water (NRW) compared with 73.3 per cent in 2019 (Figure 15E). In Kingston, St Andrew & St Thomas, approximately 56.1 per cent of the water produced was NRW compared with 56.2 per cent in 2019, while for the category, Other Parishes, 80.3 per cent of water produced was NRW compared with 78.1 per cent in 2019.

The number of new connections to the NWC's network increased by 1.7 per cent to 518 199 and was attributed to an expansion in housing stock. This increase in connections reflected a higher number of connections in Other Parishes (2.2 per cent to 377 131) and Kingston, St Andrew & St Thomas (0.6 per cent to 141 068) {see Table 15.12}.

The utility's revenue grew by 8.6 per cent to \$34.3 billion and was attributed to an increase in the water and sewerage rates charged to customers. This growth in revenue reflected increases of 17.4 per cent to \$13.7 billion in revenues for Kingston, St Andrew & St Thomas and 3.4 per cent to \$20.5 billion in revenues for Other Parishes (see Table 15.12).

OUTLOOK

Compared with 2020, the Electricity & Water Supply industry is expected to expand in 2021, predicated on economic recovery from the impact of the COVID-19 pandemic. As the virus is contained, due to measures implemented by government to curb its spread it is expected that economic activity will increase, resulting in higher demand for goods and services. Consequently, demand for electricity and water is expected to rise, particularly among commercial customers.

Within the Electricity sector, MSET is expected to mobilize the Generation Procurement Entity (GPE) to procure the next tranche of generation capacity. The GPE will manage and administer the procurement process, by means of competitive bidding from prospected IPPs under established protocols. There are also plans to undertake a renewable Energy Penetration Survey to update and confirm the extent of renewable energy uptake and an Energy End Use Survey to investigate the changes in electricity load patterns and end use consumption allocations. The results from these surveys will support load forecasts for energy sector planning.

Within the water sector, the NWC is expected to continue work on projects under its Capital Investment Programme. Some of the major projects include the:

- continuation of the Kingston Metropolitan Area Water Supply Programme, with the focus in the coming year being the Kingston and St Andrew Non-Revenue Water Reduction component. The focus will be on improved detection of non-visible leaks, rationalizing the water supply network in Kingston and St Andrew, streamlining the approach to carrying out pipelines repairs and the training of key NWC personnel in various aspects of non-revenue water management
- commencement on a five-year performance based Non-Revenue Water Reduction programme in Portmore. The programme will be implemented under a co-management arrangement and is expected to impact approximately 200 000 persons in areas such as Greater Portmore, West Cumberland, Waterford and Hellshire
- reduction of NWC's electricity bill by use of more efficient electro-mechanical equipment as well as application of renewable energy technology such as a Floating Solar PV at the Mona reservoir. The NWC will continue the procurement and installation of Renewable Energy Systems at key facilities and locations. ■

TRANSPORT, STORAGE AND COMMUNICATION

INTRODUCTION



REAL VALUE ADDED
-12.3%

Real Value Added (RVA) for the Transport, Storage & Communication industry declined by 12.3 per cent relative to 2019 (Figure 16A). This performance reflected a turnaround following seven consecutive years of growth. The lower RVA stemmed from a

fallout in both the Transport & Storage and Communication sub-industries and was attributable to the impact of measures introduced to reduce the effects of the Coronavirus Disease (COVID-19) pandemic. These included the closure of airports, travel bans, “work from home” arrangements, limits on the size of gatherings, curfews and stay at home measures. In addition, the industry was also affected by

reduced activities in the Mining & Quarrying industry. For the Transport & Storage segment of the industry, the indicators that recorded declines were:

- passenger movements at the island’s international airports, by 66.0 per cent to 2 251 632
- total volume of domestic cargo handled at the island’s ports (inclusive of petroleum products), by 16.9 per cent to 13 165 thousand tonnes
- the number of ship calls to the island, by 20 to 3 227.

With regard to the Communication sub-industry, performance was dampened by sluggishness in the usage of telecommunication services, evidenced by a fall-off in the total number of telephone subscribers. Relative to December 2019, data showed that the total number of telephone subscriptions fell by 3.3 per cent to approximately 3.3 million. The mobile penetration rate was at 105.0 per cent and teledensity¹ of 121.0/100 population². These compared with 110.6 per cent and 125.2/100 population in 2019, respectively.

With the onset of the COVID-19 pandemic in March, a review of the strategic approach to the implementation

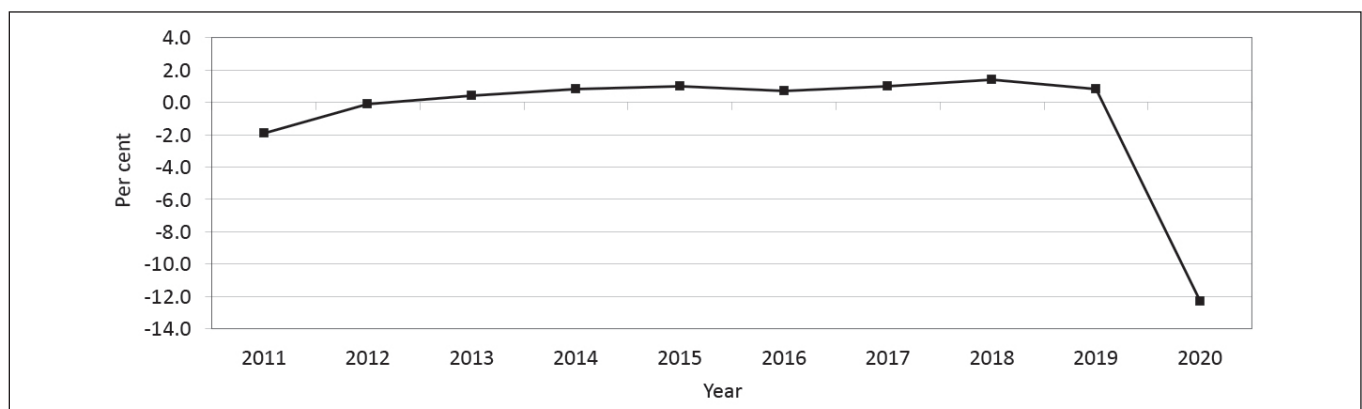


FIGURE 16A: REAL VALUE ADDED GROWTH RATES FOR THE TRANSPORT, STORAGE & COMMUNICATION INDUSTRY, 2011–2020

1. Teledensity refers to the total number of telephone lines (mobile and fixed) per 100 population.
 2. Population data from STATIN were not available at the time of writing. The population size of 2 734 100 and 2 735 400 used in the calculations were estimated by the PIOJ using the annual rate of growth for 2019 and 2020.

of the country's two major planning frameworks was paramount. The activities pursued in the Transport, Storage & Communication industry were consistent with articulated strategies, outcomes and goals of Vision 2030 Jamaica – National Development Plan (NDP). Consequently, there was continued focus on building resilient infrastructure, promoting inclusive and sustainable industrialization; and fostering innovation—in tandem with Outcome 9, Strong Economic Infrastructure of the Jamaica's NDP and Sustainable Development Goal 9, Industry, Innovation and Infrastructure of the *2030 Agenda for Sustainable Development*.

EMPLOYMENT

There was a decline in the average employment³ for the Transport, Storage & Communication industry. On average, approximately 60 333 persons were employed compared with 65 533 in 2019. The industry's share of total employed labour force was 5.1 per cent compared with 5.3 per cent in 2019. Consistent with the contraction in average employment, the average number of males employed in the industry declined from 54 133 to 51 400. Likewise, the average number of females declined from 11 400 to 8 933. The share of employment within the industry for males and females was 85.2 per cent and 14.8 per cent, respectively. This compared with 82.6 per cent and 17.4 per cent in 2019, respectively.

UTILITY REGULATION

One of the major drivers of national development, the information and communications technology (ICT) sector has been positioned and reorganized in accordance with its national strategy, which is to expand the broadband network island-wide and encourage greater use of ICT. The Office of Utilities Regulation (OUR) consistent with its mandate⁴ continued to facilitate the process, evidenced by activities undertaken by the regulator during the year. These include:

- **assessment of Fixed Infrastructure Sharing Costs** – The OUR began development of a Fixed Infrastructure Sharing Model. This will provide the OUR with a reliable means of determining infrastructure sharing charges in a timely manner. A Determination Notice outlining the methodological framework to be used to develop the fixed infrastructure sharing model was issued in December 2020.
- **update on the Mobile Long Run Incremental Cost (LRIC) Model** – The OUR consulted on the updated

mobile cost model. The model was updated to reflect changes in the market conditions, technology and international best practice in estimating the costs of an efficient operator.

- **update of the Fixed Long Run Incremental Cost (LRIC) Model** – During the first half of 2020, the OUR consulted on and issued a Determination Notice on the changes required to the methodology to update the existing model. Consultation on the updated model commenced in December.
- **work on Improving Information Transparency in the Telecommunications Markets** – In July the OUR issued a Determination Notice, which outlined remedies requiring service providers to disclose to consumers, information on telecommunication services that is accurate, timely and easily accessible. The remedies are intended to assist customers in understanding and managing their usage of telecommunications services and to reduce bill shock. Telecommunications providers are required to implement the remedies in three phases. Two of the three phases were executed in the 2020. The final phase is to take effect in December 2021.

In addition, Determination Notice on the revision of the Jamaican National Numbering Plan, the National Dialing Plan and the Telecommunication Numbering Rules was issued in May. Work also continued on the update of the weighted average cost of capital for telecommunications carriers, ensuring equivalence of access and choice for persons with disabilities in telecommunication markets and review of the Number Portability Framework.

TRANSPORTATION

A sustainable, competitive, safe, accessible, and environmentally friendly transport network providing world-class air, land, rail and marine facilities contributing to a vibrant import, export and transshipment trade for Jamaica and the world is the Vision of the Transport sector. This remained although the COVID-19 pandemic necessitated a reexamination of the strategic priorities of the Transport sector as articulated in the Medium Term Framework 2018–2021. Consequently, work continued on various policy and regulatory frameworks, infrastructure projects, programmes and initiatives to support and improve policy, institutional capacity and capabilities and the infrastructural base of the industry.

3. Average Employment represents data for January, July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for industry composition. At the time of writing comparable data was only available for January, July and October.

4. See ESSJ 2019.

Policies and Programmes

The 2017 National Transport Policy continues to guide activities in the Transport sector. Notwithstanding, plans have been approved to revise the Policy and a consultant was being procured to undertake the revision in collaboration with other stakeholders. The process will be informed by reports garnered from a four-day consultation workshop held in February and March 2019.

With regard to the Legislative Programme for the Transport sub-industry, focus was on the Road Traffic Act, 2018, Regulation, Civil Aviation (Amendment) Bill, and the Shipping (Pollution Prevention, Response, Liability and compensation) Bill, 2020. Most activities involved the Ministry of Transport & Mining and the Office of the Chief Parliamentary Counsel (CPC) working through a number of drafting instructions associated with the foregoing.

Privatization of the Jamaica Railway Corporation (JRC) – The government is seeking a suitable private investor to finance, rehabilitate, maintain and operate the commercial railway operation between Montego Bay, St James and Appleton, St Elizabeth. The Transaction Advisor commenced the activities to value the commercial line of JRC operation, complete the Business Case and thereafter submit to Cabinet the recommended Transaction Structure for approval. Currently, there are only private freight rail operations undertaken by bauxite companies. A proposal to establish a passenger rail service on two segments of the existing network—Old Harbour to Spanish Town and Linstead to Spanish Town—is being discussed. This was supported by the establishment of a Squatter Management Oversight Committee in July. The Committee provides updates to the Enterprise Team and offers oversight to the Squatter Management Consultancy, for which procurement commenced in November 2020. The consultant updates the 2013 Squatter Identification and Registration Survey. This is a precursor to the development of a strategic plan and budget for the relocation and management of the formal and informal settlements within the rail reservation from Montego Bay to Appleton in St Elizabeth.

Infrastructure Development

The National Works Agency (NWA), consistent with its mandate, continued to undertake several infrastructure transport-related development projects. A total of \$16.7 billion were expended by the NWA, an increase of approximately \$0.8 billion relative to 2019. This facilitated infrastructure works associated with the South Coast Highway Improvement Project (SCHIP), the Rural Road Rehabilitation Project II – Tom’s River to Broadgate, as well as emergency road repairs due to damage caused by

Tropical Storms Zeta and Eta. With regard to the latter, there was extensive damage to the road network and the NWA undertook emergency work to include the clearing of more than 206 roads islandwide that were affected by landslides, mud flows, downed trees, washed out bridges and flooding. Work valued at \$1.0 billion commenced on across all 63 constituencies – de-bushing, drain cleaning, sanitization, waste removal, beautification, pothole patching and minor road repairs. Other programmes undertaken were:

SCHIP⁵ – Work continued on both Parts A and B of the project. Part A entails a 28 kilometre long tolled dual carriageway from May Pen in Clarendon to Williamsfield in Manchester. The project is being implemented by the National Road Operating and Constructing Company they secured the planned right-of-way and commenced work, and was 15.0 per cent complete at year-end. Expenditure to December was approximately \$3.5 billion.

Part B, approximately 139.9 km of road from Harbour View, St Andrew to Port Antonio, Portland being implemented by NWA is divided into three subparts:

- Part B (ii) Harbour View to Yallahs Bridge
- Part B (iii) Yallahs Bridge to Port Antonio
- Part B (iv) Morant Bay to Cedar Valley

These were further divided into 15 packages. Engineering designs were completed for Parts B (ii) and (iii) and works are ongoing in five priority packages, that were at varying stages of completion. The contractor for Part B (ii) of the project is China Harbour Engineering Company (CHEC), while Parts B (iii) and (iv) are being subcontracted to local contractors by CHEC.

Montego Bay Perimeter Road Project – Preparatory work associated with the project continued, including the issuance of the environmental permits, thereby paving the way for the signing of the main contract and the provision of access. The project is a 14.9 kilometres four-lane bypass from Howard Cooke Boulevard through Temple Gallery to Ironshore.

Major Infrastructure Development Programme (MIDP) – The Programme was substantially completed at year-end. Works done included remedial or close out works on properties that were affected due to the work activities carried out during the projects. The objective was to rectify or restore impacted properties to the state they were before construction on the projects. These included restoring access to properties where the driveways or parking lots were claimed for the project, restoration of side roads, sidewalks, drains and retaining walls. In addition, apparent defects were also addressed by the contractor.

5. See Chapter on Construction

Bridge Programme

Rehabilitative works (bridge reconstruction, bridge repair, replacement and protection works) were effected on three bridges, the:

- Liguanea Bridge in St Andrew commissioned in July, at a cost of \$26.5 million
- Barracks River Bridge in St Mary commissioned in October, at a cost of \$34.0 million.

The procurement process for the Tiber River Bridge in St Mary and the Mahogany Vale Bridge in St Thomas commenced.

1. LAND TRANSPORT

Traffic Management/Road Safety

For fiscal year (FY) 2020/2021 a budgetary allocation of \$166.0 million was earmarked for traffic management and control activities. This remained unchanged compared with the past two fiscal years. The sum supported spending on strategies aimed to enhance safe and secure utilization of the road transport sector. Focus was placed on conducting a feasibility study, aimed to create a plan of action to manage traffic congestion caused by buses and taxi operators. Currently plans are in place to relocate these operators to more practical locations. In addition, there is the compilation of Volume II of the Traffic Control Devices Manual. The main purpose of this document is to provide information to road users on utilizing the roadways safely.

Performance

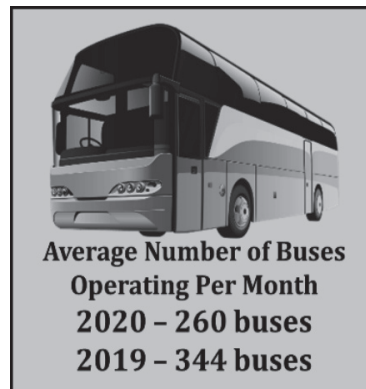
A total of 521 940 vehicles were certified fit by the Island Traffic Authority (ITA) to utilize the island's roadways compared with 507 082 during 2019. Vehicle inspection were carried out on 551 886 vehicles compared with 554 309 in 2019. There were 60 761 applicants for drivers and 44 810 were issued. This compared with 77 670 applicants and 54 510 issuances in 2019.

Passenger Movement & Transit

Approximately 30 477 vehicles provided public transport services across the island relative to 38 159 in 2019. The shortfall in the number was attributed to the reduced number of buses required, given the implementation of measures to contain the spread of the coronavirus – work from home and online schooling. Seating capacity totalled 179 038 compared with 218 830 the previous year. There was a surplus of 10 404 seats for Licenced Rural Route Taxis, an increase of 9 765 relative to 2019. There was an

estimated deficit of 1 614 seats for Licenced Rural Stage Carriages, resulting from the combined effects of surplus seats buses operating in some areas and deficit in others. A deficit of 692 seats was recorded for buses operating in the Montego Bay Metropolitan Transport Region (MMTR). These buses (Montego Bay Metro) are akin to the JUTC and assist in providing transportation services along two main corridors, Montego Bay to Falmouth and Montego Bay to Sandy Bay.

Public Buses



The JUTC operated on 65 regular routes, 28 express routes, 27 premium routes and 3 special service routes for the physically-challenged within the Kingston Metropolitan Transport Region (KMTR), unchanged relative to 2019. In addition, the company continued to provide

charter services. The JUTC operated from three depots, Rockfort, Portmore and Spanish Town, while continuing to use of the former Ashenheim Road Depot as Central Maintenance. To complement the JUTC's provision of transport services, 342 sub-licences were engaged operating along 41 routes.

An average of 260 buses operated per month in the KMTR relative to an average of 344 buses per month in 2019. This marked the third consecutive year of decline, but was exacerbated by the pandemic. Several measures related to the COVID-19 restrictions and protocols reduced the mobility of the public, thereby negatively impacting public transportation. Among these were the work-from-home orders for non-essential workers and the public sector, advisory for persons to avoid non-essential travel, and physical distancing requirements. The fewer number of buses dispatched led to downturns in associated indicators:

- revenue passenger trips⁶ by 47.4 per cent to 21.6 million, the fourth consecutive year of decline
- Fare Income, 45.3 per cent to \$1.9 billion, the fourth consecutive year of contraction
- revenue from Charter Trips, 59.9 per cent to \$110.0 million, the third consecutive year of decline.

6. Revenue Passenger Trips refer to the number of times passengers utilize the service.

Approximately 3 755 new Smarter Cards⁷ were issued compared with 13 965 in 2019, contracting for the sixth consecutive year. This out-turn reflected the impact of COVID-19 on travel, as well as most commuters already own Smarter Cards. The associated revenue intake decreased by 50.0 per cent to \$425.0 million. The share of revenue intake for Smarter Cards remained unchanged at 33.0 per cent of JUTC's Fare Income.

Licences – Public Passenger Services

A total of 76 356 applications⁸ for licences were received by the island's Transport Authority compared with 74 501 during 2019. This emanated from increased requests from the Commercial Carriage category, 7.5 per cent to 42 444, which outweighed a contraction of 3.2 per cent to 33 912 in requests for Public Passenger Vehicle (PPV) licences. Within the Commercial Carriage category, both subcategories—Private Carriers and Public Carriers—recorded respective increases of 7.9 per cent to 30 551 and 6.8 per cent to 11 914. The fall-off in requests for PPV licences reflected downturns in most of the categories surveyed:

- Hackney Carriage by 4.2 per cent to 5 573
- Contract Carriage by 9.9 per cent to 5 591
- Rural Stage Carriage by 4.6 per cent to 823
- JUTC Stage Carriage by 31.9 per cent to 448
- JUTC Express Carriage by 10.7 per cent to 50.

Requests for Route Taxi licences was 21 427 compared with 21 434.

There was a reduction in licences issued for both PPV and Commercial Carriage, by 7.9 per cent to 33 746 and 6.1 per cent to 40 127, respectively. This translated in an overall decline in licences issued, by 6.9 per cent to 73 873. For PPV, the decline reflected contraction in licences issued to all subcategories surveyed, with the exception of Route Taxi (Table 16.1). Hackney Carriage with the largest absolute decline of 2 729 was the main contributor to the fallout, followed by JUTC Express and Rural Stage Carriage with absolute declines of 893 and 253, respectively. The downturn in licences issued for Commercial Carriage category reflected the combined effect of a decline of 10.4 per cent to 26 909 in issuances for Private Carriers and an expansion of 4.1 per cent to 13 218 in issuance for Public Carriers.

2. MARITIME TRANSPORTATION

The expansion and diversification of the maritime infrastructure and services and the development of Jamaica as a regional logistics hub with multimodal transport linkages, was articulated in the MTF 2018 – 2021. This mirrors government's priority, to create a strong economic infrastructure as detailed in the NDP. Consequently, there was continued focus on several initiatives and projects linked to the Logistic Hub Initiative (LHI) to include the Re-development of the Reynolds Pier, in St Ann, the Hampden Wharf, in Trelawny; and the Montego Bay Freeport – Berth 1 Construction and Berth Expansion, in St James.⁹

TABLE 16.1
TAXI SERVICE: LICENCE ISSUED, 2016 - 2020

Licence Type	2016	2017	2018 ^r	2019	2020 ^p	% Change	
						2019/2018	2020/2019
PPV TOTAL	19 265	24 626	27 126	36 625	33 746	35.0	-7.9
Route Taxi	11 789	15 237	16 747	20 634	21 916	23.2	6.2
Hackney Carriage	1 502	2 467	3 183	7 883	5 154	147.7	-34.6
Contract Carriage	4 354	5 181	5 546	5 112	5 098	-7.8	-0.3
Rural Stage Carriage	875	1 010	832	1 288	1 035	54.8	-19.6
JUTC Stage Carriage	724	709	780	749	477	-4.0	-36.3
JUTC Express Carriage	21	22	38	959	33	2 423.7	-93.1
COMMERCIAL CARRIAGE TOTAL	31 801	34 529	40 727	42 723	40 127	4.9	-6.1
Private Carriers	22 545	25 437	29 283	30 024	26 909	2.5	-10.4
Public Carriers	9 256	9 092	11 444	12 699	12 218	11.0	4.1
GRAND TOTAL	51 066	59 155	67 853	79 348	73 873	16.9	-6.9

p – preliminary
r – revised

Source: Transport Authority

7. The Smarter Card is a cashless fare collection system launched in December 2002 for the Kingston Metropolitan Transport Region (KMTR).
8. This total refers to the categories surveyed as indicated in Table 16.1. The figures for Public and Private Carriers are not included.
9. See Chapter on Construction

BOX 16.1 NUMBER OF ENTITIES OPERATING IN THE SPECIAL ECONOMIC ZONE 2019 AND 2020		
CATEGORIES	2019	2020
Developer (multi-occupancy)	24	44
Developer (single occupancy)	19	24
Occupant	53	63
Zone User	5	15
TOTAL	101	146

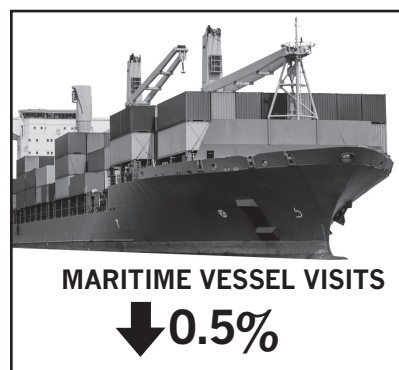
Work continued on the implementation of the Special Economic Zone Regime. To facilitate this, entities that operate in the Zone are divided into four categories – Developer (Multi-Occupancy), Developer (Single entity), Occupants and Zone Users. The number of entities in all categories increased compared with 2019, with Developer (multi-occupancy) recording the largest absolute increase of 20 (Box 16.1).

Following delays brought on by the COVID-19 pandemic, actions to facilitate the development of the Caymanas Special Economic Zone (CSEZ) were continued. The way forward is supported by a CSEZ

Feasibility Study final report, completed in February 2019, which indicated that the site meets market demand, satisfies tenant requirements, satisfies standard lending conditions and regulatory requirements, and incorporates design guidelines to accommodate the consumer, community and the environment.

Performance

The number of maritime vessel visits to the island contracted by 0.3 per cent to 3 227 (Table 16.2). This stemmed from a 36.5 per cent decline to 706 in the number of calls to Outports, as ship calls to the Port of Kingston increased to 2 521 from 2 106. The year's



out-turn was mainly fuelled by reduced number of ship calls for three quarters, which outweighed increase in the other. The fallout was mainly linked to the onset of the COVID-19

TABLE 16.2
PORTS: SHIP TRAFFIC & CARGO FLOW, 2016 - 2020

	2016 ^f	2017 ^r	2018 ^p	2019	2020 ^p	% Change	
						2019/2018	2020/2019
KINGSTON							
No. of Vessel Visits	2 522	2 281	2 268	2 106	2 521	-7.1	19.7
Volume of Cargo ('000 tonnes) ^a	11 067	13 354	16 921	16 026	15 070	-5.3	-6.0
- Domestic ^a	3 087	3 903	4 090	4 179	3 778	2.2	-9.6
- Petroleum Product	2 338	2 106	1 973	1 981	1 702	0.4	-14.1
- Transshipment	7 980	9 446	12 831	11 824	11 292	-7.8	-4.5
OUTPORTS							
No. of Vessel Visits	1 064	1 218	1 290	1 111	706	-13.9	-36.5
Volume of Cargo ('000 tonnes)	8 872	8 493	11 114	9 677	7 685	-12.9	-20.6
- Landed	2 627	2 822	4 418	3 611	2 179	-18.3	-39.7
- Loaded	6 245	5 670	6 696	6 065	5 506	-9.4	-9.2
TOTAL - ALL PORTS							
No. of Vessel Visits	3 586	3 499	3 558	3 217	3 227	-9.6	-0.3
Volume of Domestic Cargo ('000 tonnes)	14 298	14 502	17 178	15 839	13 165	-7.8	-16.9
Volume of Total Cargo ('000 tonnes)	22 278	23 947	30 009	27 661	24 457	-7.8	-11.6

a – excludes petroleum products

p – preliminary

r – revised

Source: Port Authority of Jamaica

pandemic and the associated measures undertaken to stem the spread. The total number of ship calls when disaggregated by type, showed Cargo & Other, up 7.5 per cent to 3 073 and Cruise passenger ship calls, down 68.2 per cent to 150. The decrease in the latter was due to the curtailment of cruise ship calls to the island, consequent on the measures associated with the pandemic.

The total volume of cargo handled at the **Port of Kingston** was 15 070 thousand tonnes, a decline of 6.0 per cent compared with 2019. This was due to a 4.5 per cent contraction to 11 292 thousand tonnes in the volume of transshipment cargo handled, and a 9.6 per cent decline to 3 778 thousand tonnes in the volume of domestic cargo handled. Contributing to the out-turn at the Port of Kingston were reduced activities at the Kingston Freeport Terminal, Kingston Wharves and the Sufferance (Private) Wharves). The **Outports** also recorded decline in the volume of cargo handled, 20.6 per cent to 7 685 thousand tonnes, reflecting fall-offs in both the volume landed and loaded (see Table 16.2). The performance at the Outports reflected reduced volumes handled at Port Kaiser, which handled 60 974 tonnes compared with 1 385 953 tonnes in 2019, followed by Port Esquivel, by a 13.4 per cent to 1 408 288 tonnes and Montego Bay by 24.8 per cent to 628 817 tonnes. The contraction at Port Kaiser was reflective of the closure of JISCO Alpart, one of the companies that shipped from this port. These outweighed the growth in cargo handled at Port Rhoades and Rocky Point, by 4.3 per cent to 3 736 571 tonnes and 2.1 per cent to 1 533 862 tonnes, respectively.

Combined, the out-turn at the **Port of Kingston** and the **Outports** resulted in a decline of 11.6 per cent to 24 457

thousand tonnes in the total volume of cargo handled (inclusive of petroleum products). This was due to contractions in the volume of transshipment and domestic cargo handled (see Table 16.2).

3. AIR TRANSPORTATION

Undertakings associated with air transport were consistent with the national strategy to expand the country's domestic, international air transport infrastructure and services. Among the projects continued was the **Upgrading of the Ian Fleming International Airport (IFIA)**. Upgrading activities were completed under the Phase 2 Project on infrastructure works being undertaken at IFIA. Activities on Phase 2 involved:

- Construction of a new quarantine/isolation facility to mitigate against the spread of COVID-19
- Acquisition of the Caribbean Aviation Training Centre Building /Hangar to build out offices for airport stakeholders
- Runway widening and lighting works to accommodate Code C aircraft completed.
- Commenced the construction of a police post.

Performance

The industry's performance was impacted by actions taken to contain the spread of the COVID-19. The declaration of the country as a disaster area, coupled with the closure of its borders to passenger traffic severely affected the industry. The borders were closed from March 21 to June 15, however, it was opened from June 1 to Jamaicans returning home. Subsequently on June 15,

TABLE 16.3
INTERNATIONAL AIRPORTS: MOVEMENTS OF AIRCRAFT, PASSENGERS, CARGO AND MAIL, 2019 - 2020

	2019 ^r				2020 ^p				% Change (Total)	
	N.M.I.A	S.I.A	IFIA	TOTAL	N.M.I.A	S.I.A	IFIA	TOTAL	2019/2018	2020/2019
Arrivals	911 756	2 349 181	636	3 261 573	305 576	783 347	210	1 089 133	7.1	-66.6
Departing	926 527	2 357 762	594	3 284 625	318 222	826 981	196	1 145 399	6.9	-65.1
Intransit	15 547	59 267	25	74 839	2 881	14 462	57	17 400	33.3	-76.8
Total Passengers	1 853 560	4 766 210	1 267	6 621 037	626 679	1 624 790	463	2 251 932	6.3	-66.0
Aircraft Movement	21 783	42 283	992	65 057	12 303	9 454	422	22 179	2.5	-65.9
Cargo (Kilograms)	10 886 910	7 181 099	0	18 068 009	7 118 878	3 388 654	0	10 507 532	-4.4	-41.8
Mail (Kilograms)	1 766 482	0	0	1 766 482	969 179	0	0	969 179	-8.3	-45.1

p – preliminary
r – revised

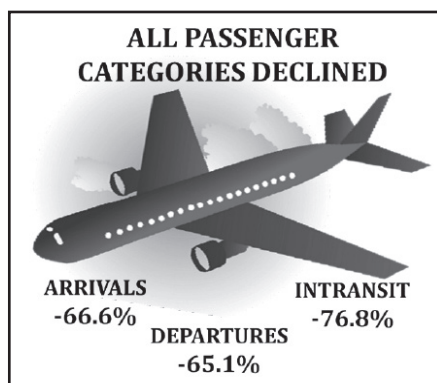
Source: SIA, PAC Kingston Airport Ltd and Airports Authority of Jamaica

the borders were reopened to international travel, amid restrictions to include the establishment of resilient corridors. With the discovery of a new strain of the virus, the borders were again closed to United Kingdom travellers on December 2020.

Passenger traffic was facilitated by the United States of America carriers as European carriers did not restart routes. This may be attributed to reduced demand and the continued fear of contracting the virus. With the pandemic affecting most countries, the former may have been supported by the absence of discretionary spending.

Reflecting the impact of the COVID-19 pandemic, total passenger movements through the island's international airports contracted by 66.0 per cent to 2 251 932 (Table 16.3). This out-turn mirrored reduction in all passenger categories—

Arrivals, 66.6 per cent to 1 089 133, Departures, 65.1 per cent to 1 145 399 and Intransit, 76.8 per cent to 17 400 passengers. The reduced out-turn emanated from lower passenger traffic at all three international airports relative to 2019.



- NMIA 626 679 compared with 1 853 560
- SIA 1 624 790 compared with 4 766 210
- IFIA 463 compared with 1 267.

The reduced passenger movement at the NMIA stemmed from fall-offs in all passenger categories disaggregated as follows Arrivals by 66.5 per cent to 305 576 passengers, Departures by 65.6 per cent to 318 222 and Intransit by 81.5 per cent to 2 881 passengers.

At the SIA, the contraction stemmed from lower passenger traffic for all categories – Arrivals from 2 349 181 to 783 347, Departures from 2 357 762 to 826 961, and Intransit from 59 267 to 14 462 passengers.

For the IFIA, the decline in passenger traffic mirrored the fallout in Arrivals from 636 to 310 and Departures from 606 to 196. Intransit passengers, however, increased to 57 from 25.

Aerodromes

While discussions are ongoing on a strategic model to enhance their efficiency, the public aerodromes continued to facilitate movement of tourists, leisure and business passengers. A total of 7 131 passengers utilized

the facilities compared with 7 339 in 2019. For 2020, the disaggregation was:

- Tinson Pen 1 121 compared with 1 082
- Negril 5 658 compared with 5 917
- Ken Jones 352 compared with 340.

STORAGE

The performance of the Storage and Warehousing sub-industry, traditionally a small segment of the Transport, Storage & Communication industry, generally reflected the level of activity in the Goods Producing industry, particularly at the ports. While there continued to be increased emphasis on logistics, warehousing and storage activities in the sub-industry have been affected by the impact of the pandemic. With regard to activities at the ports, preliminary data recorded by the PAJ showed the



volume of domestic cargo handled was 13 165 thousand tonnes compared with 15 839 thousand tonnes. This reflected contractions of 9.6 per cent to 3 778 thousand tonnes at the Port of Kingston and 20.6 per cent to 7 685 thousand tonnes at the Outports.

With regard to warehousing, the total space leased by the Factories Corporation of Jamaica (FCJ) grew to 47 812.78 square metres from 37 675.50 square metres in 2019. The lease rates per year were between \$2 945.77 and \$9 684.00 per square metre compared with between \$2 945.77 and \$6 903.72 per square metre in 2019. Due to the challenging economic impact brought about by the pandemic the FCJ implemented several strategies to support clients, which formed part of the company's COVID-19 Stimulus Programme.

COMMUNICATION

Policy Framework

A number of initiatives were undertaken by the responsible ministry—Ministry of Science, Energy &

Technology (MSET), in keeping with the articulated strategies:

- creation of an appropriate policy and regulatory environment conducive to investment in ICT and network development
- expansion of the deployment of Community Access Points (CAPs) and community multi-media centres

The following constitutes some of the areas of focus.

The ICT Authority

The ICT Authority Act, 2019 seeks to bring the entire ICT function of Government under one roof, by transferring the functions of eGov Jamaica Limited (eGovJa) and the Office of the Chief Information Officer (OCIO) to the ICT Authority, provide a single authoritative voice and framework to promote improvements in ICT service management in the public sector and assist with driving the Government's digital agenda. To facilitate this, the following activities were undertaken:

- establishment of a six member Transition Team to conduct activities essential to establishing the ICT Authority, including the consolidation of the eGovJa and the OCIO. Three of the six team members were recruited in positions of the Executive Programme Lead, ICT Lead and the Legal Lead
- submission of the Authority's Target Design to the Ministry of Finance and the Public Service (MOFPS) for its consideration and approval
- establishment of a Transition Advisory Group (TAG), chaired by the Permanent Secretary, and comprising of representatives from the OCIO, the Cabinet Office, the MOFPS and eGovJa's Board of Directors. The TAG is responsible for overseeing the ICT Authority implementation activities leading to the publication of the appointed date for the coming into force of the ICT Authority Act.

Establishment of the Office of Information Commissioner

The Data Protection Act (2020), seeks to define the general principles for the treatment of personal and sensitive personal data and provide transparent oversight that will enable the public and private sectors to strengthen protection of personal data. With regard to the matter of oversight, the Act makes provision for the establishment of an Office of the Information Commissioner (OIC) with responsibility for, *inter alia*:

- monitoring compliance with the Act and attendant regulations
- providing advice to the Minister
- disseminating information to the public in relation to the operation of the Act
- preparing and disseminating or directing the preparation

and dissemination of guidelines to be adhered to as good practice

- encouraging the preparation and dissemination of self-initiated guidelines.

Accordingly, MSET established a budget for the OIC and received approval from the MOFPS for an interim structure, comprising twenty-three posts, to establish and operationalize the OIC.

Open Data Policy

The Blue Print Report, which is the Road Map and Action Plan for ICT transformation in government, identified the development of a policy to govern the access, use, reuse, adaptation and distribution of government data in digital form, that is made available with the technical and legal characteristics necessary for it to be freely used, reused and redistributed by anyone, anytime and anywhere. The Open Data Policy, is a key deliverable to improve efficiency and transparency in the delivery of government services and to encourage private sector-led innovation. Accordingly, the Ministry in seeking to give effect to the provisions of the Blueprint Report, developed a draft Open Data Policy and circulated same to critical Ministries, Departments and Agencies for comments. The MSET intends to finalize the policy for submission to the Cabinet for consideration and approval in 2021.

National Broadband Initiative

The national ICT Policy recognises the efficient deployment of high capacity networks as critical to stimulating entrepreneurship and accelerating the provision of public and private sector services. However, the COVID-19 pandemic brought into focus the urgency of having this network in place in the shortest possible time, as a means of bridging the digital divide. Therefore, in keeping with the mandate to establish a national broadband network to scale up e-government infrastructure; strengthen the country's readiness to operate in the virtual space; and hasten the transformation to a society built on the foundation of a digital society, the Ministry embarked on a number of activities to effect the mandate.

In this regard, the MSET in collaboration with critical stakeholders, to include the National ICT Advisory Council, NWA, eGovJa, Universal Service Fund (USF), Spectrum Management Authority and the Transformation Implementation Unit:

- mapped the existing broadband infrastructure, owned or operated by government or private telecommunication or cable providers
- identified public sites which require broadband connectivity and prioritized these sites
- identified critical policies and legislation which are required to ensure sustainability
- identified the technical specifications of the

physical infrastructure that will be required and the estimated costs for implementation.

The approach to the development of a national Broadband Network has been compartmentalized into Plan 1 and Plan 2. The former seeks to address the immediate and short term needs to coordinate COVID-19 ICT-related response activities and provide support to ongoing ICT projects across the public sector, while the latter seeks to address long term communication infrastructure gaps that mitigate against the provisioning of internet access in unserved and underserved communities.

Data Protection Bill

The Bill was tabled and passed in the Houses of Representatives in June and received the Governor General's Assent in July. The Data Protection Act (2020) will enable the public and private sectors to strengthen protection of personal data (including sensitive personal data). The MSET will pursue the development of Notices, Orders and Regulations that are required to enable the successful implementation of the provisions of the Act. In this regard, the provisions of the Act allow for different days to be selected for the implementation of various provisions and different types of personal data.

Quality of Service Rules

Work progressed on the drafting of the Quality of Service Rules aimed at, *inter alia*, prescribing minimum targets to be achieved and maintained by telecommunications licensees in respect of various technical and customer service quality parameters. In this regard, the MSET worked closely with the OUR to review the discussion draft of the Rules. Further drafting instructions were issued to CPC and a second draft of the Rules prepared by the CPC.

New Investments in the Industry

The growth of the Business Processing Outsourcing (BPO) industry was impeded by the pandemic. This occurred as planned investment by some companies of approximately US\$21.6 million and job creation opportunities of 4 100 jobs were stalled. In addition, with employees contracting the virus, employment in the industry initially fell by 20.0 per cent as some companies lost contracts and employees were sent home. Given the high density of persons per square foot/metre in the BPO sector, adjusting modes of operation to comply with mandated protocols became critical, but posed a challenge to the sector's viability. However, there was a respite when the companies were facilitated by government's approval of the sector as an essential service. Accompanying this was implementation of the work-from-home (WFH) measures,

which allowed companies to rebound and continue to provide services to their clients. These support structures also resulted in rehires, some expansions of existing clientele and an increase in the progression towards higher value-added outsourcing services, aided by initiatives to enhance the labour pool.

In the latter part of the year, as WFH models became prominent and the sector showed resilience to the pandemic, some operators reported full or close to full recovery of jobs and a willingness to pursue their expansion plans. Employment in the industry was estimated at more than 40 000 persons at the end of 2020, approximately 10.0 per cent below 2019. There were new entrants and expansions, which included:

- *IBEX Global Expansion* – launched its St Ann location with an initial 300 employees and is anticipated to increase to 750 employees when fully outfitted
- *Centerfield BPO Expansion* – expanded its footprint with further development at its Kingston, 20–22 Trinidad Terrace location with an additional 14 610 square feet (sq. ft.) to accommodate 270 employees
- *Itel BPO Expansion* – through the acquisition of 50 000 sq. ft. of space in New Kingston Shopping Centre to accommodate between 560 and 1 000 employees
- *Sutherland Global Expansion* – acquisition of space at Portmore Informatics Park to employ an additional 1 000 employees
- *Hinduja Global Solutions Expansion* – acquisition of 50 000 sq. ft. space at the Portmore Informatics Park to accommodate 800 employees
- *National Pen Expansion* – relocated to another space in the Montego Bay Special Economic Zone, allowing them to grow from 230 seats to 400 seats.
- *Segoso* – a Jamaican outsourcing company, wholly owned by United States of America shareholders. The activities of the company involved the near-completion of the refurbishment of a 3 200 sq. ft. facility in the Montego Freeport Shopping Centre. The project will employ 82 employees
- *Innovative Vision* – a marketing technology BPO out of Toronto, Canada. The company opened one of its two overseas location in Kingston in March. There are currently 250 seats with three clients, 100 of which presently work from home and the other 150 on site.

The BPO labour enhancements, which encouraged business expansion and attract new ones, occurred as recruits continue to master services, such as customer care, sales and tech support, and exhibit proven competence for higher valued services. Hence, the steady growth in Knowledge Process Outsourcing (KPO) and Information Technology Outsourcing services to include, Payroll Processing, Patient Information Management, Laboratory

& Physician Information Services, Full Stack Development, Network & Database Management and Application Hosting.

With regard to training for the sector, the HEART/NTA Trust/ focused on improving the quality of its job-readiness training programmes by partnering with select companies. This is an initiative to train 1 000 software programmers in partnership with Amber Group which will employ graduates at the end of their tenure.

Additionally, in preparing to grow their offering of higher value-added services, several outsourcing companies began to engage various tertiary and post-secondary specialised training institutions to find ways for the institutions to provide the companies with the knowledge workers they require. Knowledge areas include finance and accounting, human resource management services, market research, proposal writing and medical services.

Progress was made on expanding the BPO Infrastructure. More than 400 000 sq. ft. of new construction was completed, adding to the more than 2.0 million sq. ft. of space currently occupied by BPO companies in Jamaica. While Montego Bay and Kingston & St Andrew remain the main locations for the establishment of BPO centres, there has been interest in other parishes, such as Manchester, St Ann, St Mary and Hanover where BPOs are currently operational.

Performance

Eight Carrier and 15 Service Providers licences were granted/renewed in the telecommunications industry compared with four Carrier licences and six Service

Provider licences in 2019 (Table 16.4). Combined, a total of 606 licences were issued/granted since the liberalization of the sector in 2000.

The total number of telephone subscriptions was estimated at 3 309 508 compared with an estimated 3 421 921 at the end of December 2019 (Table 16.5). This translated to a teledensity of 121.0/100 population at the end of December 2020 compared with 125.2/100 population at the end of December 2019. The number at the end of December 2020 comprised 2 873 259 mobile subscriptions with a mobile penetration rate of 105.0 per cent. This compared with an estimated 3 023 873 at end of December 2019 and a mobile penetration rate of 110.6 per cent (Table 16.5). The number of Fixed

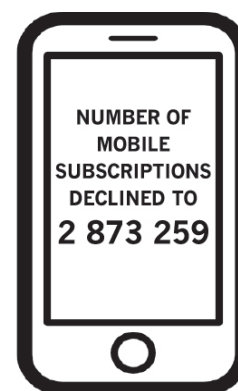


TABLE 16.4
NUMBER OF TELECOM LICENCE GRANTED, 2016 - 2020

Licence Type	2016	2017	2018	2019	2020 ^P
Service Provider	6	3	4	6	15
Carrier	1	1	1	4	8
Total Issued	7	4	5	10	23

p – preliminary
r – revised

Source: ICT Division MSET

TABLE 16.5
TELEPHONE SUBSCRIBERS BY CATEGORIES 2016 - 2020
(NUMBER OF LINES)

Categories	2016	2017	2018	2019	2020 ^P	% Change	
						2019/2018	2020/2019
Fixed Subscriptions	310 213	297 026	363 820	398 048	436 249	9.4	9.6
Residential	234 992	225 491	293 051	327 654	370 026	11.8	12.9
Business	75 221	71 736	70 769	70 394	66 223	-0.5	-5.9
Mobile Subscriptions	3 267 344	3 091 222	2 964 974	3 023 873	2 873 259	2.0	-5.0
Pre-Paid	3 085 087	2 904 168	2 763 879	2 805 222	2 653 338	1.5	-5.4
Post-Paid	182 157	187 054	201 095	218 651	216 225	8.7	-1.1
Total Telephone Subscribers	3 577 557	3 388 249	3 328 794	3 421 921	3 309 508	2.8	-3.3
Teledensity	131.0	124.2	122.1	125.5	121.0	2.7	-3.4
Internet	1 781 399	1 613 126	1 787 069	1 948 649	2 127 583	9.0	9.2
Broadband	192 074	200 909	284 756	317 907	385 603	11.6	21.3
Mobile Broadband	1 589 325	1 412 217	1 502 313	1 630 742	1 741 980	8.5	6.8

p – preliminary

Source: Office of Utilities Regulation

subscriptions was 436 249 relative to 398 048 at the end of December 2019. Increased Residential subscriptions by 12.9 per cent to 370 026 was the main contributor to growth in Fixed subscriptions. Business subscriptions declined by 5.9 per cent to 66 223, the fourth consecutive year of decline (see Table 16.5).

Internet subscriptions was 2 127 583 at the end of December, of which, 1 741 980 are Mobile Broadband and 385 603 are Fixed Broadband. At the end of 2019, there were 1 630 742 and 317 907, respectively.

Community Access Points (CAPs)

An additional six CAPs were established under the USF, bringing the total sites to 322. These additional sites were located at:

- Spicy Grove Resource Centre (St Mary)
- Tree Hills Resource Centre (St Mary)
- Flankers Primary & Junior High (St James)
- Montego Bay Boys & Girls Club (St James)
- Red Ridge Bank Resource Centre (St Andrew)
- Beeston Street new Testament Church of God (Kingston).

The USF, under the *Connect Jamaica Programme* rolled out six new public Wi-Fi hotspots in the parishes of St James, St Mary, Clarendon, St Ann and Portland, resulting in 13 locations islandwide.

The Post and Telecommunications Department

Approximately 28.5 million pieces of mail was handled by the Department compared with 43.0 million pieces in 2019. This resulted from contraction in the heavily-weighted Letters category, which declined by 34.4 per cent to 28.1 million pieces, due to the impact of COVID-19. Respective increases of 21.1 per cent to 281 000 pieces and 58.5 per cent to 130 000 pieces in the volume handled in the categories

Parcels and Others, were insufficient to outweigh the fall-off in the Letters category. Contributing to the expansion in the Parcels category, was the increased utilization of the service by Small and Medium Enterprises due mainly to the competitive rates.

Reflecting, the reduced activity of the Department, revenue declined from \$ 1 178.0 million in 2019 to \$818.0 million. Expenditure increased by 4.0 per cent to \$2 455.0 million. This out-turn resulted in a deficit of \$636.0 million compared with the \$1 183.0 million recorded in 2019 (see Table 16.6).

Consistent with government's plan to reform and modernize the postal sector, the Post and Telecommunications Department continued:

- the implementation of its customized International Postal System (IPS), which will give the agency full control over data storage and customizing of software to their needs
- the implementation of Data Declaration System, a mandatory Postal Union requirement to capture all barcoded items containing goods or merchandize (non-documents) for Letters, Small Packets, Parcels and Express mail Service. It is a web-based customs declaration management application used by postal administration and Customs
- Klick 'N' Ship Express, a freight forwarding system that provides solution for online shoppers.

OUTLOOK

The Transport, Storage & Communication industry is expected to grow in 2021. This is predicated on anticipated improvements in the international and by extension the national economy as the pandemic eases. The areas that will facilitate higher real value added include:

- increased activities at the island's air and sea ports,

TABLE 16.6
POST and TELECOMMUNICATIONS DEPARTMENT OPERATING AND FINANCIAL DATA, 2016 - 2020

	2016	2017	2018	2019	2020 ^p	% Change	
						2019/2018	2020/2019
Volume of Mail handled ('000)	43 556	45 073	43 861	43 043	28 473	-1.9	-33.8
Letters (Including Registered)	43 401	44 906	43 678	42 810	26 062	-2.0	-34.4
Parcels	55	71	86	151	281	75.6	86.1
Others	99	94	96	82	130	-14.6	58.5
Finances (\$M)							
Revenues	1 310	1 338	1 271	1 178	818	-7.3	-30.6
Expenditures	2 065	2 093	2 157	2 361	2 455	9.5	4.0
Surplus (Deficits)	-755	-755	-886	-1 183	-1 636	-34.0	38.2

p – preliminary

Discrepancies in table are due to rounding

Source: Post and Telecommunications Department

resulting in expansions in stopover arrivals and cargo volume handled

- ongoing developments in the telecommunications segment of the industry
- continued expansion of the BPO infrastructure and labour enhancements
- fast-tracking new and ongoing infrastructural projects, such as SCHIP, Montego Bay Perimeter Road Project.

These combined with other projects linked to the government's Growth Inducement Agenda, to involve the continued implementation of projects associated with the logistics hub initiative, should provide growth support. However, the extension of the pandemic is among the downside risks and will slow the performance in the economies of Jamaica's main trading partners and result in negative spill-over effects. Unfavourable weather conditions and other unpredictable occurrences can also hinder growth in the industry. ■

HOTELS AND RESTAURANTS

INTRODUCTION

Real Value Added (RVA) for the Hotels & Restaurants industry fell by 53.5 per cent the first annual decline since 2001 and the lowest level of RVA since 1992. This out-turn was attributed to the disruptive effect of the Coronavirus Disease 2019 (COVID-19) on global travel, as passenger aircrafts were grounded for several months of the year. To limit the spread of the virus, Jamaica imposed travel

Stopover Arrivals
67.2%



Cruise Passenger Arrivals
71.1%



restrictions on various countries, which culminated in the closing of the border to incoming passenger traffic between March 21 and June 15. This subsequently led to a decrease in the number of Foreign Nationals who visited the island. However, a further contraction in RVA was tempered

by an increase in the average length of stay for Foreign Nationals at all accommodations. The number of Cruise Passenger Arrivals and the number of ship calls to the island's cruise ports declined. Total Visitor arrivals to the

island decreased, the second consecutive year of decline in visitor arrivals. At the regional level, the Caribbean Tourism Organization (CTO) reported a decline in tourist arrivals for all countries. Similarly, the United Nations World Tourism Organization (UNWTO) reported that global tourist arrivals decreased.

The Restaurant component of the industry was estimated to have declined, as measures implemented (e.g. curfews, no in-house dining and physical distancing requirements) to slow the spread of COVID-19 led to a reduction in persons utilizing restaurants.

POLICIES & PROGRAMMES

Oversight and guidance of the Tourism sector remained in the purview of the Ministry of Tourism (MOT) in alignment with Vision 2030 Jamaica – National Development Plan and the strategies and actions outlined in the Medium Term Socio-Economic Policy Framework (MTF), 2018–2021. The policies and programmes were implemented to achieve planned sector outcomes by the year 2022¹. In light of the pandemic and the closure of Jamaica's border to international travel, the MOT revised its sector outcomes for 2020 as follows:

- restore the number of stopover arrivals to at least 870 032 persons
- restore foreign exchange earnings from stopover arrivals to a minimum of US\$1.28 billion

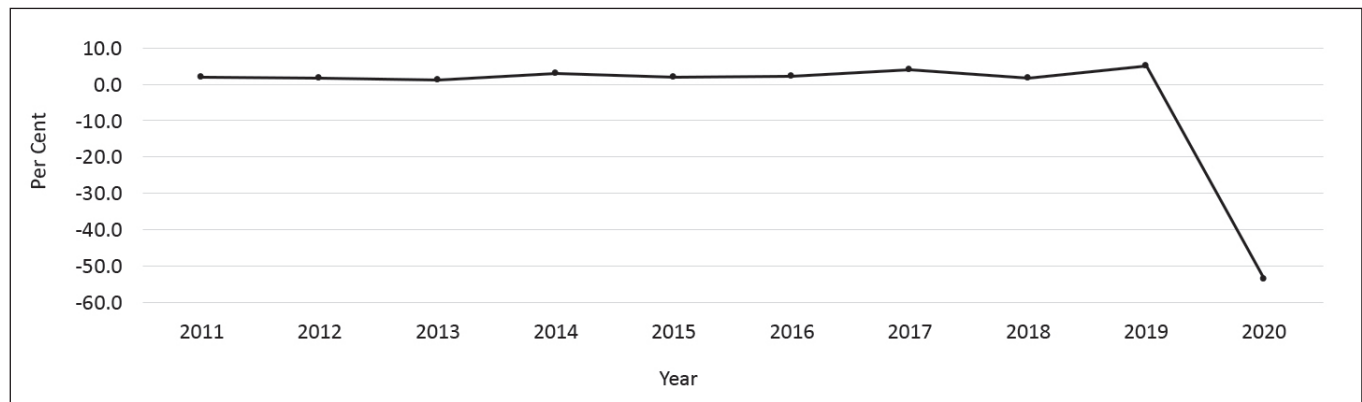


FIGURE 17A: PERCENTAGE CHANGE IN REAL VALUE ADDED FOR HOTELS & RESTAURANTS, 2011–2020

1. See ESSJ 2019 for a breakdown of the sector outcomes.

- increase the capacity of the Ministry’s online training programme to support furloughed tourism workers
- increase the level of COVID-19 compliant tourism enterprises
- develop and implement the Tourism Health & Safety protocols for the reopening of the sector
- increase the number of Jamaicans vacationing in Jamaica through the *Rediscover Jamaica Campaign*
- increase the percentage of tourism enterprises that have crisis communication /business continuity/ pandemic response/recovery plans in place
- increase the opportunities for linkages/networking between Small and Medium Tourism Enterprises (SMTEs) to compensate for shortfalls in traditional sources of tourism demand.

STATUS OF MAJOR POLICIES AND PROGRAMMES

Destination Assurance Strategy and Framework

The work to develop a Destination Assurance Strategy and Framework commenced in June with the engagement of a consultancy team and the establishment of a steering committee to guide the process. Consultations have been undertaken through focus groups as well as one-on-one consultations with key members of the sector and from Ministries, Departments and Agencies. The draft Strategy and Framework has been completed and submitted by the consultants to the MOT for review.

The Destination Assurance Framework and Strategy aims to streamline the development of Jamaica’s tourism product by instituting guidelines to support existing tourism development efforts. The Destination Assurance Framework and Strategy aims to facilitate, among other things, collaboration between the public and private sector to identify critical activities that will improve visitor expectations, coordinate efforts to improve security conditions, especially in resort areas and facilitate planning for sustainable service delivery.

Destination Assurance Programme

This Programme seeks to develop and implement initiatives and projects that guarantee visitors a safe, secure and seamless experience. Efforts included strategies that focused on providing a hassle free experience, a healthy natural environment, an aesthetically attractive landscape, and products and services that meet or exceed international standards for quality. The following activities associated with the programme were carried out:

- Destination Managers were assigned for all resort areas
- The Jamaica Constabulary Force (JCF) was given

equipment by the MOT to assist with the safety and security aspects of the programme.

- Destination Assurance Councils engaged agencies in collaboration with Destination Managers to resolve issues affecting the respective resort areas.

Multi Hazard Contingency Planning Programme

Initiatives conducted under this programme were:

- Earthquake & Tsunami Training Sessions

The Ministry engaged more than 100 stakeholders in Port Antonio during a four month period to have multiple earthquake drills, develop disaster plans and strengthen their response capacity. A functional earthquake simulation was held in the Port Antonio Destination Area in March.

- Tourism Emergency Management Committee

The Tourism Emergency Management Committee was convened in June 2020. An online meeting was held under the theme *Strengthening Tourism’s Preparedness as we enter the Hurricane Season under the COVID-19 Pandemic*, five speakers presented and more than 50 stakeholders joined the meeting. Issues relating to the ongoing COVID-19 pandemic and the historic 2020 Atlantic hurricane season were examined and discussed.

Tourism Linkages with other Sectors

The Tourism Linkages Network (TLN) in fulfilling its mandate of building relationships with other sectors assisted with the execution of the following projects and initiatives:

- **Tourism Agri-Linkages Exchange (ALEX) Call Centre** – There are four Agro Brokers, one Senior Agro Broker and one Coordinator employed to the Centre. As a result of the pandemic, the TLN purchased laptops and Closed User Groups mobile phones to facilitate the staff working from home. There are currently 774 farmers, 156 buyers and 117 products currently listed on the platform. During June–December produce valued at \$7 231 640.00 was sold through the platform.
- **Style Jamaica Shopping Showcase** – A virtual staging of STYLE Jamaica from Main Street Jamaica, formerly Shoppes at Rose Hall, St. James from December 16–17 and was livestreamed via various social media platforms. The STYLE Jamaica 2020 Shopping Showcase was planned and executed to showcase Jamaican fashion and accessory designers while integrating Jamaica’s culture through entertainment and food. Entertainment included a fashion runway show, live entertainment and steel orchestra.

- **Christmas In July Tradeshow** – This was held virtually in July and streamed live. The tradeshow targeted buyers who were invited to view the exhibits and provide exposure for local producers of high-quality corporate gifts and souvenir items. A total of 170 local manufacturers displayed items from the following product categories — fashion and accessories, art and crafts, processed foods, aromatherapy and souvenirs such as desktop items and décor.
- **Natural Skincare Product Development Workshop For Spas** – A hybrid workshop was held November, 16–17. Day one of the workshop was held virtually with the presenters sharing their content via livestream. While day two was held in-person at the Montego Bay Convention Centre with a limited number of attendants. This workshop series was geared towards building the capacity of local wellness practitioners in the area of product development using locally sourced raw materials. The workshop promoted natural product innovation from plant-based ingredients and encouraged the development of home-grown skin care product lines.
- **Health And Wellness Tourism Conference** – Staged virtually during November, under the theme, *Reset, Reimagine, Restore*. The conference intended to gather various stakeholders in the industry for presentations and panel discussions on various topics relating to the theme. These discussions were intended to provide recommendations that can redefine Jamaica’s health and wellness tourism product. Topics discussed during the conference included:
 - global health and wellness tourism data and insights
 - wellness travel and experiences
 - nutraceuticals and herbaceuticals
 - wellness technologies
 - wellness and culture
 - wellness music
 - investing in wellness
 - wellness media and trends.
- **Disc Jockey (DJ) Academy Jamaica Online** – A total of 65 DJs were trained under the programme. The training was executed in collaboration with Jamaica Centre of Tourism Innovation (JCTI) and all were required to complete Team Jamaica training offered by the Tourism Product Development Company (TPDCo). This training programme was developed by the Sport and Entertainment Network with the purpose of building the capacity of DJs currently employed in the local tourism sector. The aim of the project was to improve entertainment offerings to

guests and patrons within the tourism sector, based on observed and reported opportunities for the enhancement of DJ performances and enhancing the hard and soft skills (emotional intelligence) of participants.

- **Taste Jamaica Cooking Live Series** – The *Taste Jamaica @ Home* cooking live series started in May, in alignment with the national #TanAYuhYaad campaign, was created to provide viewers with recipes to try at home. It supported the promotion of locally sourced ingredients and easy ways to prepare meals while at home. A deliverable of the series was the compilation of a recipe book and menus from the meals prepared during the series. More than 500 copies of recipe books were distributed to tourism stakeholders.

Initiatives undertaken by the Ministry and its Public Bodies as a result of COVID-19

Online training programme

Facilitated by Jamaica Centre for Tourism Innovation (JCTI) and the Tourism Enhancement Fund (TEF), between April and July, 5 000 tourism workers were trained and certified. This was implemented to support the development of tourism workers by offering opportunities for them to achieve relevant certification. The strategy prepared employees to return to their jobs with upgraded skills and help businesses ensure that their workforce met the highest standards.

Tourism Recovery Taskforce (TRT)

The TRT was established by the MOT as public/private sector partnership and consisted of two main working groups to focus specifically on land-based and cruise tourism. The taskforce was mandated to develop a strategy for the reopening and recovery of the tourism sector, once international travellers were allowed back into the island.

COVID-19 Tourism Health and Safety Protocols

These protocols were enhanced health hygiene and safety standards to be adhered to, by tourists, tourism workers and tourism entities. All employees and patrons of these facilities were required to observe the established protocols of hand hygiene, social/physical distancing and the wearing of masks in public spaces. This was an initiative of the TPDCo in collaboration with the Ministry of Health & Wellness (MOHW).

Resilient Corridors

This initiative was a part of the government’s risk management strategy to reduce the likelihood of transmission of the virus between visitors and residents while reopening the country’s borders to international

travel. The concept of resilient corridors was implemented using a multi-phased approach, which was established to manage the movement of visitors within a designated area. Within these corridors all interactions are subject to the enhanced health and safety standards directed by the MOHW as set out in the COVID-19 Tourism Health and Safety Protocols. All tourism entities in operation within the corridors are required to have a COVID-19 Resilient Certificate.

- Phase 1: the North Coast Resilient Corridor began in June and was established along the main road from Negril to Port Antonio on the Northern Coast of the island. It facilitated visits to accommodations such as hotels, villas and guesthouses
- Phase 2: South Coast Corridor commenced in July and spanned from Milk River in Clarendon to Negril in Westmoreland.

Certification of tourism establishments as COVID-19 Compliant

The TPDCo conducted inspections of tourism entities to ensure that they implemented the relevant protocols and infrastructural changes to safely operate in the sector. The implementation of these protocols should reduce transmission between visitors and workers. Entities were required to obtain this certification before opening to the public.

Provision of COVID-19 Resilient Packages

Facilitated by the TEF, SMTEs received COVID-19 packages consisting of two infrared thermometers, two touchless sanitizer dispensers, and two hands free waste bins. The TEF also utilized local suppliers to manufacture more than 20 000 masks for distribution to frontline tourism workers across the island, including ground transportation providers and craft vendors.

MARKETING AND PROMOTION

The marketing of Jamaica's tourism sector continued to be in the remit of the Jamaica Tourist Board (JTB) to support brand *Destination JAMAICA*. Following the soft launch of the *JAMAICA: Heartbeat of the World* marketing campaign in late 2019, the JTB began the full rollout of the campaign during the first quarter of the year. Developed to integrate all channels of marketing and public relations, a 30-second television commercial was created to lead the campaign and was distributed to various media houses in the main source markets of tourist arrivals to the island.

However, this was brought to a standstill as globally the travel and tourism industry was adversely impacted by the spread of the COVID-19 virus. On account of this, the JTB

worked with internal and external stakeholders to draft a Destination JAMAICA Recovery Plan, to guide the team on how to navigate the pandemic and position the destination for growth in the aftermath of COVID-19. To maintain the destination's relevance internationally, digital marketing content was produced, and various digital activations were deployed across the JTB's social media channels. These included: the *Escape to Jamaica* (Instagram TV series); *Wake up Jamaica* (Blue Mountain Coffee feature); *Jus' Chill Like a JAMAICAN* video; and *Look Around JAMAICA series* (a virtual walking tour across the destination).

To restart the domestic tourism economy, the JTB shifted its marketing efforts to an Omni-channel local recovery campaign *Rediscover Jamaica*. Launched in July to promote domestic travel and boost the recovery campaign & rebound for industry stakeholders; Jamaicans were encouraged to 'taste, see, feel and enjoy' the country's tourism product, while adhering to the tourism safety protocols. Through its continued sponsorship of local events to attract international arrivals, the JTB sponsored the following events: *Rebel Salute, Hanover Charities & Chukka Polo Tournament, Fat Tyre Festival* and the *Jamaica Rum Festival*.

TOURISM TRAINING

The TPDCo is the agency responsible for developing and enhancing Jamaica's tourism product. With the onset of the pandemic and the shutdown of the tourism sector, the agency re-aligned and re-strategized its operations to assist with the reopening of the sector. The key activities undertaken by the agency were to:

- monitor the implementation of the Tourism Health & Safety Protocols
- monitor activities within the COVID-19 Resilient Corridors
- conduct sensitization sessions with tourism operators on the Protocols for re-opening
- continue the execution of projects geared towards improving destination assurance.

Additionally, the TPDCo provided a total of 133 training programmes to 1 528 participants with the aim of developing the human capital within the industry. A total of 112 Team Jamaica programmes were delivered to 1 244 participants, of which, 1 205 persons received certification. There were 21 Skills Training Programmes for the year with a total of 284 participants, of this total, 225 persons were certified.

LICENSING OF TOURISM ENTITIES

The Licence Processing Unit of the TPDCo issued a total of 5 133 licences, which was 886 fewer than in 2019. Of the total number of licenses processed, 24 were new with the

remainder representing renewals. When disaggregated, the new licenses issued were Attractions (4), Hotels (6) and Non-Hotels² (14).

PERFORMANCE

Total Visitor Arrivals³

A total of 1 329 675 persons visited Jamaica, a decrease of 2 904 475 persons relative to 2019 (Table 17.1). This performance was attributed to a reduction in the numbers of both Stopover and Cruise Passenger arrivals and is against the background of the destabilizing impact of the COVID-19 pandemic on international travel. Lower visitor arrivals were recorded for all months of the year (Figure 17B).

Stopover Arrivals



Stopover arrivals fell by 67.2 per cent to 880 404 persons (see Table 17.1). This performance is against the background of the closure of the Jamaican border to incoming passenger flights during April and May, as well as, travel restrictions being imposed on and by some countries. On June 15, 2020, Jamaica reopened its borders to international travellers. The subcategories, Foreign Nationals and Non-Resident Jamaicans registered decreases of 67.9 per cent to 798 290

persons and 58.5 per cent to 82 114 persons, respectively. Stopovers from the island’s seven source markets all declined and as a result total aircraft movement into the island fell by 65.9 per cent to 22 179. The average length of stay for Foreign Nationals at all types of accommodations, moved from 8.0 nights to 10.2 nights while the average length of stay for Non-Resident Jamaicans, was 21.1 nights relative to 16.5 nights in 2019. The overall increase in the average length of stay for both Foreign Nationals and Non-Resident Jamaicans, may be attributed to quarantine requirements instituted as part of the COVID-19 protocols.

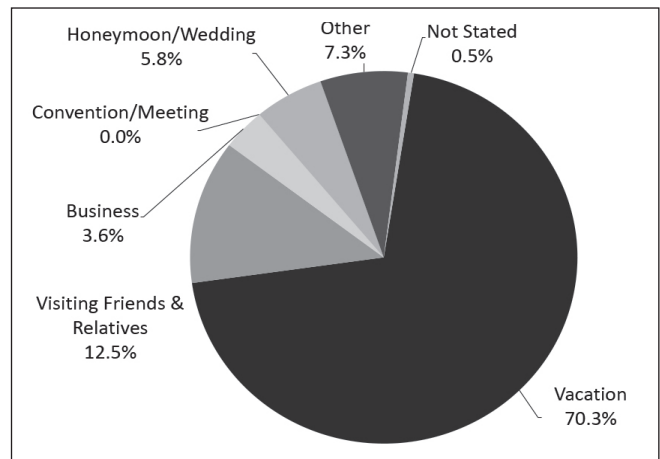


FIGURE 17C: PURPOSE OF VISIT BY FOREIGN NATIONALS, 2020

Stopover Arrivals from Jamaica’s Main Source Markets

United States of America (USA)

Stopovers from the USA, moved from 1 838 904 to 637 505 persons and accounted for 72.4 per cent of total

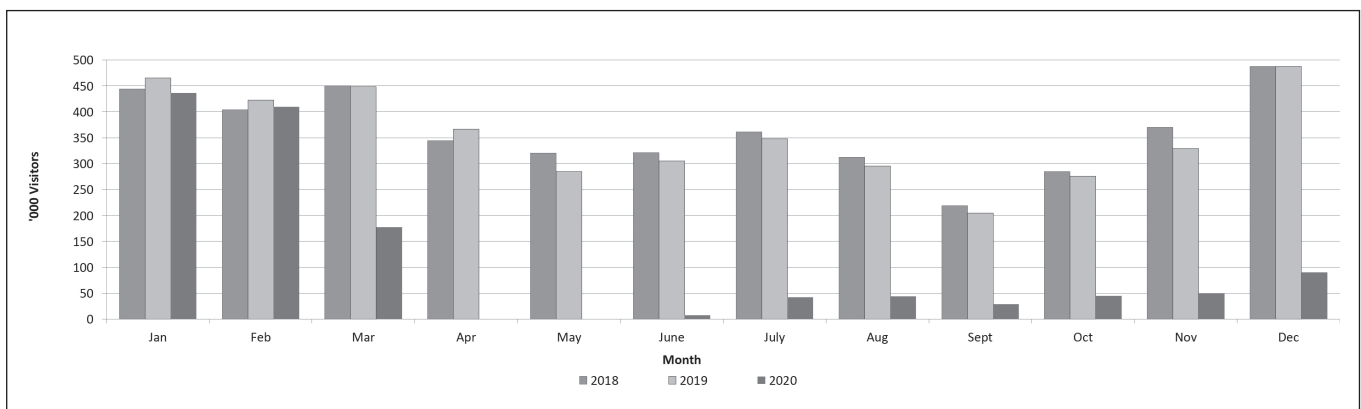


FIGURE 17B: TOTAL VISITOR ARRIVALS BY MONTH, 2018–2020

2. Non-hotels consist of Apartment, Guest House, Home Stay and Villa.
 3. Total Visitor consists of Stopover Arrivals and Cruise Passengers.

TABLE 17.1
TOURISM PERFORMANCE INDICATORS, 2016–2020

INDICATORS	2016	2017	2018	2019 ^r	2020 ^p	% Change 2019 2018	% Change 2020 2019
Foreign Nationals	2 020 381	2 196 301	2 298 162	2 483 169	798 290	8.1	-67.9
Non-Resident Jamaicans	161 303	156 614	174 570	197 751	82 114	13.3	-58.5
STOPOVER ARRIVALS	2 181 684	2 352 915	2 472 727	2 680 920	880 404	8.4	-67.2
Cruise Passengers	1 655 565	1 923 274	1 845 873	1 552 346	449 271	-15.9	-71.1
TOTAL VISITOR ARRIVALS	3 837 249	4 276 189	4 318 600	4 234 150	1 329 675	-2.0	-68.6
Average Length of Stay (Nights) ^a	8.8	8.4	8.2	8.0	10.2	-2.9	27.9
Total Foreign Exchange Earnings (US\$M)	2 607.7	2 978.0	3 305.5	3 643.9	1 362.4	10.3	-62.6
Stopover Foreign Exchange Earnings (US\$M)	2 457.9	2 800.9	3 121.2	3 482.6	1 316.9	11.6	-62.2
Cruise Passenger Foreign Exchange Earnings (US\$M)	149.8	177.0	184.3	161.3	45.5	-11.9	-71.8

p – preliminary

r – revised

a – Average Length of Stay for Foreign Nationals

Discrepancies due to rounding

Source: Compiled from data supplied by the Jamaica Tourist Board

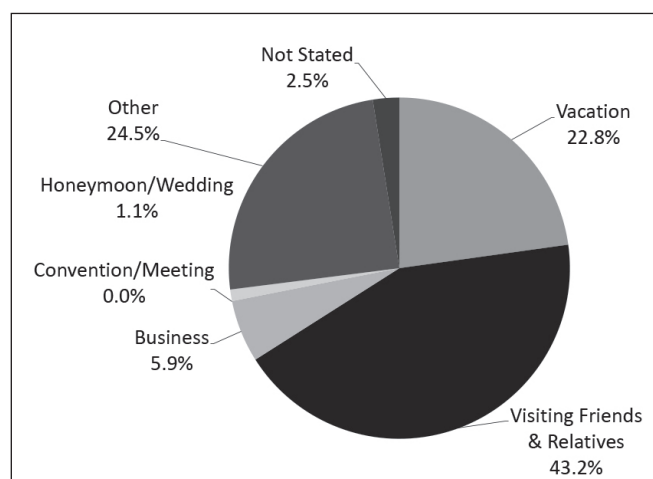


FIGURE 17D: PURPOSE OF VISIT BY NON-RESIDENT JAMAICANS, 2020

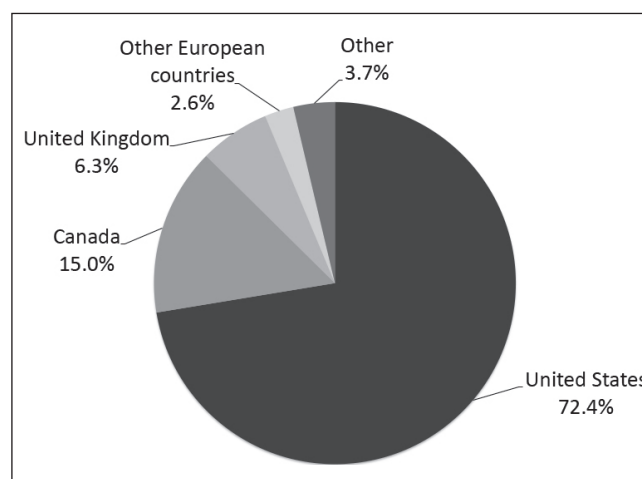


FIGURE 17E: SHARE OF STOPOVER ARRIVALS BY SOURCE MARKET, 2020

stopover visitors (Table 17.2). When disaggregated by sub-regions, stopover arrivals were as follows:

- Northeast, down 513 431 to 286 070 persons
- South, down 333 043 to 160 507 persons
- Midwest, down 198 863 to 128 693 persons
- West, down 156 062 to 62 235 persons.

Canada

There was a total of 132 014 stopover arrivals from Canada, a decrease of 263 547 persons compared with 2019. Persons visiting from this market accounted for 15.0 per cent of the total number of stopover arrivals.

Europe

European stopovers fell by 242 415 to 78 225 persons and accounted for 8.9 per cent of total stopovers. There was a reduction in arrivals from all sub-regions within this market compared with 2019, when only one sub-region registered a decline. A breakdown of the performance showed arrivals from Northern fell by 175 037 to 58 670, Southern/Western fell by 56 368 to 16 832 persons, and Central/Eastern fell by 11 010 to 2 723 persons. Also, the decline from this market can be attributed to a travel ban imposed on flights from the United Kingdom, which accounts for the largest share of stopovers from Europe (see Table 17.2).

TABLE 17.2
STOPOVER ARRIVALS TO JAMAICA BY SOURCE MARKET, 2016–2020

	2016		2017		2018		2019		2020		% Change 2020/2019
	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	
United States	1 406 058	64.4	1 509 963	64.2	1 628 402	65.9	1 838 904	68.6	637 505	72.4	-65.3
Canada	372 137	17.1	405 174	17.2	399 969	16.2	395 561	14.8	132 014	15.0	-66.6
Europe of which:	294 709	13.5	325 804	13.8	328 369	13.3	320 640	12.0	78 225	8.9	-75.6
United Kingdom	206 470	9.5	217 647	9.3	215 584	8.7	225 037	8.4	55 595	6.3	-75.3
Germany	20 768	1.0	29 858	1.3	34 255	1.4	24 128	0.9	5 504	0.6	-77.2
Spain	3 387	0.2	7 677	0.3	6 722	0.3	4 987	0.2	918	0.1	-81.6
Italy	12 893	0.6	13 699	0.6	13 721	0.6	13 540	0.5	2 788	0.3	-79.4
Other Europe	51 191	2.3	56 923	2.4	58 087	2.3	52 948	2.0	13 420	1.5	-74.7
Caribbean	65 592	3.0	63 944	2.7	67 495	2.7	71 816	2.7	15 685	1.8	-78.2
Latin America	27 726	1.3	32 224	1.4	33 922	1.4	38 885	1.5	13 827	1.6	-64.4
Asia	8 949	0.4	9 292	0.4	7 977	0.3	8 653	0.3	1 554	0.2	-82.0
Other Countries	6 513	0.3	6 514	0.3	6 593	0.3	6 461	0.2	1 594	0.2	-75.3
TOTAL	2 181 684	100	2 352 915	100	2 472 727	100	2 680 920	100	880 404	100	-67.2

Source: Compiled from data supplied by the Jamaica Tourist Board

Other Source Markets

Stopovers from the Caribbean was 15 685, a decline of 56 131 persons (see Table 17.2). The out-turn reflected lower arrivals including Cayman Islands by 80.5 per cent, Trinidad & Tobago by 82.6 per cent, Dominican Republic by 70.6 per cent, and The Bahamas by 75.9 per cent. Arrivals from Latin America fell by 28 058 to 13 827 persons (see Table 17.2). A decrease in arrivals from both South America by 60.3 per cent and Central America by 75.8 per cent was also recorded.

Cruise Passenger Arrivals

Cruise travel to Jamaica was adversely affected by the onset of the COVID-19 pandemic and the Government

attempting to limit the spread of the disease, ceased all cruise ship arrivals in March. The number of cruise passenger arrivals was 449 271 compared with 1 553 230 persons for 2019 (see Table 17.1 and Figure 17F). The number of ship calls to the island’s main cruise ports fell from 478 to 158 calls. This was due to the disrupting effect of the pandemic on the global cruise industry. This was compounded by the issuance of a *No Sail Order* by the Centers for Disease Control and Prevention (CDC) for the period March 14–October 29, 2020. Subsequently, the *No Sail Order* was replaced with a *Conditional Sailing Order* which will remain in effect until November 1, 2021 or until the order is rescinded or modified by the CDC. The Jamaican Government has not issued permission for the resumption of cruise activities.

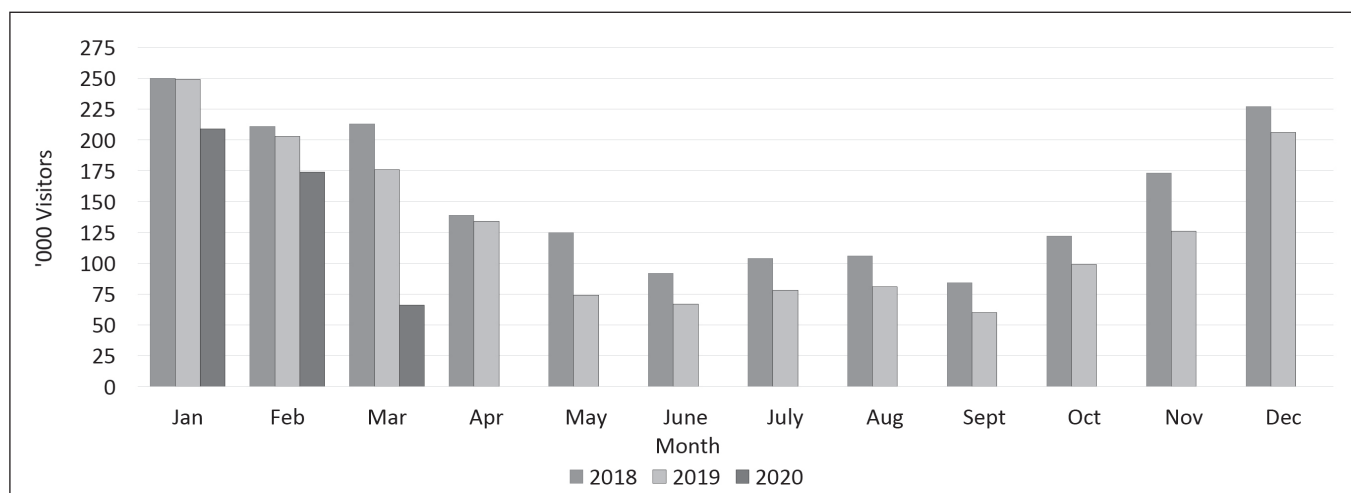


FIGURE 17F: CRUISE PASSENGER ARRIVALS BY MONTH, 2018–2020

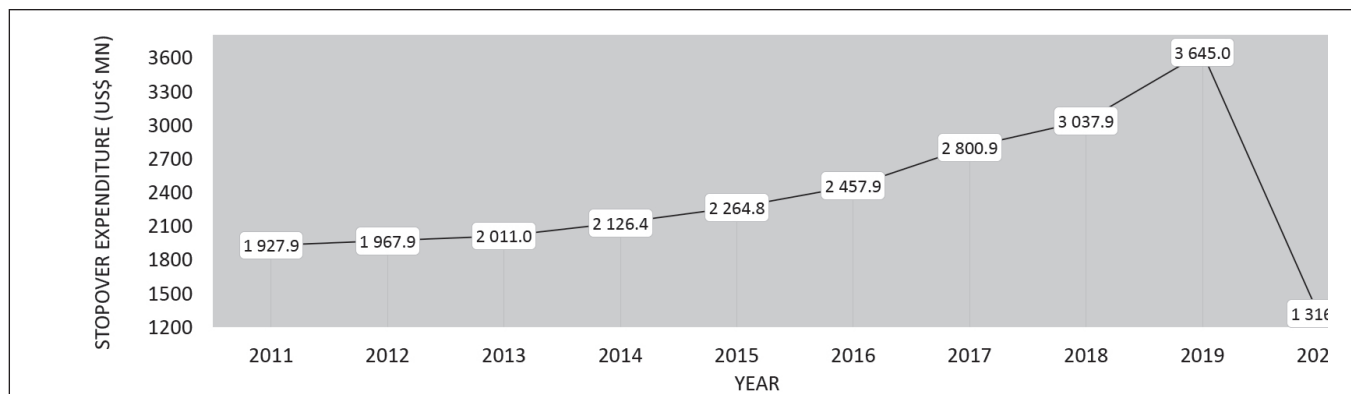


FIGURE 17G: STOPOVER EXPENDITURE, 2011–2020

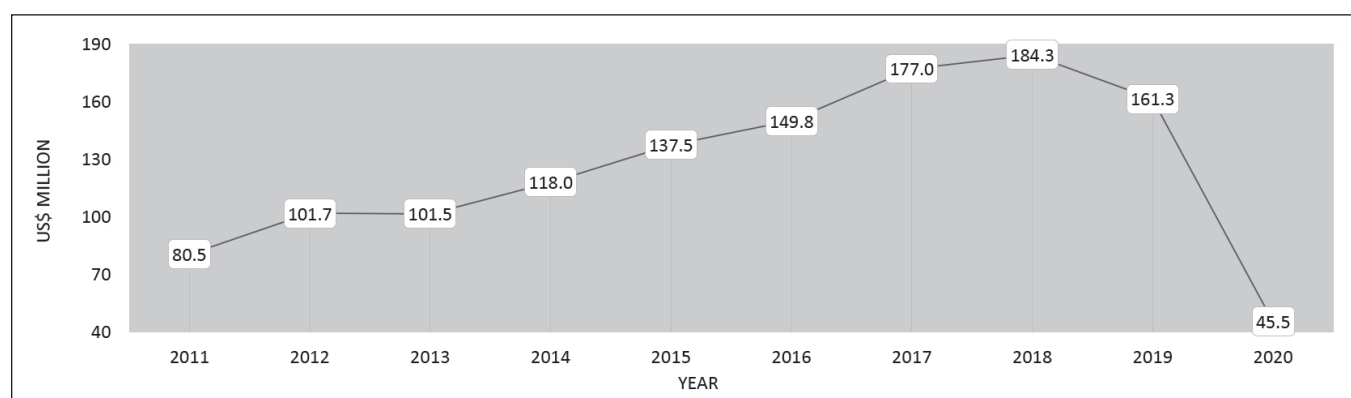


FIGURE 17H: CRUISE PASSENGER EXPENDITURE, 2011–2020

Falmouth

Cruise ship calls to the Falmouth port moved from 140 to 29 calls. These 29 calls brought a total of 115 439 passengers to the port, relative to 565 980 passengers in 2019. Of the total number of visitors, 39 964 persons participated in pre-booked tours which was 155 896 persons less than in 2019. The number of cruise passengers who participated in freelance tours fell from 54 637 to 11 397 persons.

Ocho Rios, Port Antonio and Kingston

Cruise passenger arrivals to the Ocho Rios port decreased by 61.4 per cent to 229 311 persons and the number of ship calls to the port fell from 185 to 72 calls. With regard to Port Antonio and Port Royal, there was a combined total of 4 273 cruise visitors and 4 ship calls to these ports.

Montego Bay

The resort town welcomed a total of 100 248 cruise passengers, a decline of 290 417 persons compared with 2019. The number of ship calls to the port moved from 145 to 53

calls. The number of visitors who participated in pre-booked tours fell by 151 923 to 62 295 persons. Passengers who went on freelance tours was 14 828, a decrease of 66 970 persons.

EXPENDITURE

Provisional tourist expenditure totalled US\$1 362.4 million, a decline of US\$2 281.6 million compared with 2019. This reduction in expenditure was attributed to the decrease in the number of both stopover and cruise passenger arrivals. Stopover visitors spent a total of US\$1 316.9 million, which was US\$2 165.7 million less than the sum spent in 2019 (Figure 17G). The average daily expenditure for stopover arrivals fell from US\$151.27 to US\$133.61. Cruise passenger expenditure contracted by US\$115.9 million to US\$45.5 million (Figure 17H). The average expenditure for cruise passengers per day was US\$101.21, a decrease of US\$2.72 relative to 2019.

RESTAURANTS COMPONENT

Preliminary General Consumption Tax data showed that there was a real⁴ decline of 29.0 per cent in sales by firms classified as Restaurants, Bars and Canteens. This downturn was attributed to measures implemented (e.g. curfews, no in-house dining) to stem the spread of COVID-19 which led to a decrease in the number of persons utilizing restaurants.

Employment

The average annual employment⁵ in the Accommodations and Food Service Activities industry group moved from a total of 108 033 to 90 800 persons. This was 7.7 per cent of the total employed labour force, a decrease of 1.0 per cent compared with 2019. There were respective declines of 9 900 to 56 867 persons and 7 333 to 33 933 persons in the average number of both females and males employed within the industry group. The decrease in employment is linked to the shutdown of the Tourism sector during April and May, which led to a closure of tourism establishments, for example hotels and villas, as a result of the pandemic. Notwithstanding the reopening of some accommodation and food services establishments in June, the full staff complement was not engaged.

CARRIBEAN AND INTERNATIONAL DEVELOPMENTS

Caribbean Tourism Performance⁶

Stopover Arrivals

According to provisional data from the CTO, all 26 reporting countries, registered lower stopover arrivals. Countries that reported the largest declines included Dominican Republic (62.7 per cent), Cuba (74.6 per cent), Jamaica (67.2 per cent) and The Bahamas (76.6 per cent) {Table 17.3}.

Cruise Passenger Arrivals

The CTO report showed that there was a contraction in cruise passenger arrivals to the 22 reporting Caribbean countries. The countries reporting the largest decreases were the Bahamas (75.6 per cent), St. Maarten (73.3 per cent), Jamaica (71.1 per cent) and the U.S Virgin Islands (69.3 per cent) {Table 17.4}.

TABLE 17.3
STOPOVER ARRIVALS TO THE CARIBBEAN, 2020

COUNTRY	PERIOD	2020	% Change 2020/2019
Anguilla	Jan-Dec	25 381	-73.4
Antigua & Barbuda	Jan-Dec	125 090	-58.4
Aruba	Jan-Dec	368 322	-67.0
Bahamas	Jan-Dec	422 640	-76.5
Barbados	Jan-Jun	159 144	-57.3
Belize ^p	Jan-Dec	144 123	-71.4
Bermuda ^a	Jan-Dec	42 061	-84.4
British Virgin Islands	Jan-Dec	82 687	-72.7
Cayman Islands	Jan-Nov	145 647	-67.5
Cuba	Jan-Dec	1 085 920	-74.6
Curacao	Jan-Dec	174 871	-62.3
Dominica ^p	Jan-Dec	21 733	-75.7
Dominican Republic ^a	Jan-Dec	2 405 315	-62.7
Grenada	Jan-Dec	43 815	-73.1
Guyana	Jan-Dec	86 503	-72.5
Jamaica	Jan-Dec	880 404	-67.2
Martinique	Jan-Dec	312 298	-43.9
Monsterrat	Jan-Dec	4 544	-56.3
Puerto Rico ^b	Jan-Dec	678 854	-57.9
St. Kitts & Nevis ^{d,p}	Jan-Dec	28 721	-77.7
St. Lucia	Jan-Dec	130 695	-69.2
St. Maarten ^a	Jan-Dec	106 425	-66.7
St. Vincent & The Grenadines	Jan-Mar	18 908	-18.3
Trinidad & Tobago ^c	Jan-Aug	93 147	-65.2
Turks & Caicos Islands	Jan-Sep	131 971	-64.6
U.S. Virgin Islands	Jan-Nov	363 052	-36.5

a – Non-Resident Air Arrivals b-Non-Resident Hotel Registrations

Only c – Air Arrivals by Nationality

d – Excludes data from Vance M. Amory Int'l Airport in Nevis

p – preliminary figures

N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

- Real term change discounted by the average Consumer Price Index (CPI) for the respective periods.
- Average Employment represents data for July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for July and October.
- Data based on the most current information available in the 2020 Caribbean Tourism Organization report.

TABLE 17.4
CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN,
2020

COUNTRY	PERIOD	2020	% Change 2020/2019
Antigua & Barbuda	Jan-Dec	259 426	-64.6
Aruba	Jan-Dec	255 384	-69.3
Bahamas	Jan-Dec	1 327 142	-75.6
Barbados	Jan-Dec	250 532	-63.5
Belize	Jan-Dec	343 099	-70.7
Bermuda	Jan-Dec	6 457	-98.8
British Virgin Islands	Jan-Dec	219 434	-61.8
Cayman Islands	Jan-Nov	535 716	-66.9
Curacao	Jan-Dec	256 033	-68.4
Dominica	Jan-Dec	117 979	-48.6
Dominican Republic	Jan-Dec	344 485	-68.8
Grenada	Jan-Dec	162 517	-51.9
Jamaica	Jan-Dec	449 271	-71.1
Martinique	Jan-Dec	170 399	-33.9
Puerto Rico	Jan-Jun	465 357	-50.7
St. Kitts & Nevis	Jan-Jun	267 346	-59.2
St. Lucia	Jan-Dec	297 885	-62.1
St. Maarten	Jan-Dec	435 525	-73.3
St. Vincent & The Grenadines	Jan-Mar	101 579	-29.5
Trinidad & Tobago	Jan-Dec	45 580	-50.1
Turks & Caicos Islands	Jan-Sep	205 873	-74.6
U.S. Virgin Islands	Jan-Dec	440 398	-69.3

N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

International Tourism Performance⁷

Following the onset of the COVID-19 pandemic and the subsequent introduction of widespread travel restrictions, the global tourism industry registered its worst year on record. The preliminary estimate for international tourist arrivals was 381 million persons, a decrease of 1 079 million people compared with 2019. This performance outweighed previous declines recorded during the 2009

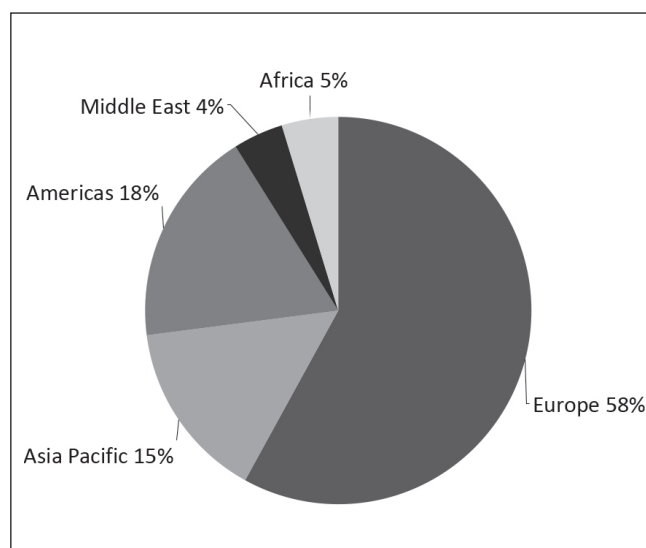


FIGURE 17I: SHARE OF TOURIST ARRIVALS BY REGION

global economic crisis (37 million people) and the Severe Acute Respiratory Syndrome (SARS) epidemic in 2003 (2 million people). When disaggregated by regions, the largest decline in international tourist arrivals were:

- Europe by 525 million to 221 million persons
- Asia & The Pacific by 303 million to 57 million persons
- Americas by 150 million to 69 million persons
- Africa by 52 million to 18 million persons
- Middle East by 49 million to 16 million persons.

OUTLOOK

Real Value Added for the Hotels & Restaurants industry is projected to grow during 2021. This out-turn is based on an increase in the number of Foreign Nationals expected to visit from the island's main source markets. Even though an expansion in RVA is expected, the island continues to be affected by the virus and the industry is not anticipated to return to pre-COVID levels of visitor arrivals. Additionally, there is optimism surrounding the planned vaccination programme to be implemented globally, as this is expected to achieve herd immunity and in turn restore confidence in international travel. ■

7. The section is based on the most current information from the United Nations World Tourism Organization.

ENTERTAINMENT & SPORT

INTRODUCTION

The Other Services¹ industry recorded a contraction of 23.5 per cent in Real Value Added (RVA), 6.0 per cent of Total RVA. The performance of the industry was negatively affected by measures implemented to stem the spread of the Coronavirus Disease 2019 (COVID-19). Those measures resulted in the cancellation of a number of entertainment and sporting events and a decline in tourist-related activities.

Impact of COVID-19 on the Industry

Entertainment

The Entertainment sector was negatively affected by the COVID-19 pandemic, which led to a contraction in economic performance. Surveys conducted by the Ministry of Culture Gender Entertainment & Sport (MCGES) to assess the impact of the pandemic indicated relatively high levels of job loss and reductions in average income. As a consequence, financial as well as other forms of assistance were provided to persons within the entertainment sector through a number of programmes, particularly the Government of Jamaica's (GOJ) COVID-19 Allocation of Resources for Employees (CARE) Programme.²

Sport

The Sport sector was also impacted by the pandemic. Surveys conducted by the MCGES involving national sport associations and federations as well as athletes revealed loss in earnings. The only professional sport league in Jamaica, the Red Stripe Premier League, reported losing in excess of \$96.0 million and had to either furlough or downsize staff. The ISSA/Grace Kennedy Boys and Girls Championships, also known as CHAMPS, one of the premier secondary school athletic championships in the world, reported a projected loss of \$160.0 million in gross revenue and \$50.0 million in net income. Independence Park Limited (IPL), facilities manager of the National Stadium Complex and the Trelawny Multi-Purpose Stadium, reported revenue loss of \$120.0 million, due to the cancellation of events.

The surveys also indicated that the cancellation of sporting events had both social and psychological impact on athletes.

POLICIES AND PROGRAMMES ENTERTAINMENT

The Entertainment Division of MCGES continued to develop policy as well as the legal and institutional framework to facilitate and encourage the growth of the Entertainment sector in Jamaica. The Division is also charged with improving market access for creative practitioners and promoting entertainment services in diverse markets, as well as bolstering the entertainment product through the coordination of signature events and promotions. This initiative is in line with the *Vision 2030 Jamaica – National Development Plan* and the priority strategies and actions outlined in the *Medium Term Socio-economic Policy Framework (MTF) 2018–2021*.

Entertainment Zones

Jamaica's first named Entertainment Zone, Fort Rocky, Kingston completed Phase I of repairs, which included site clearing, hoarding construction and demolition of non-conforming concrete structures within the Fort and the levelling of sand dunes. The Jamaica National Heritage Trust, the Urban Development Corporation (UDC), and MCGES signed a Memorandum of Understanding pertaining to Phases I, II, and III of works to be undertaken at the fort. Other potential Entertainment Zones, Districts and Venues were surveyed in Seville, St Ann (proposed Zone inclusive of three proposed Districts) Jackson Town, Trelawny identified as a proposed Dancehall District and Jamworld, Portmore St Catherine identified as a proposed Entertainment Venue. The Ministry also proposed Entertainment Zones, Districts and Venues to the National Environment and Planning Agency (NEPA) for Half Way Tree and Trelawny.

1. The Other Services industry includes private education; private health & social services; recreational, cultural & sporting activities; community, social & personal services; and private households with employed persons.
2. The CARE Programme offered support to Jamaicans affected by the COVID-19 pandemic, through a variety of grants.

Entertainment Registry & Fiscal Incentives

The Ministry registered 517 individuals and 41 companies on the National Registry of Entertainment and Creative Industries Practitioners. Registrations were largely due to the Ministry of Finance and Public Service's use of registration with the Entertainment Registry as the verification tool for the disbursement of the COVID-19 general grant offered to entertainment practitioners. The Entertainment Division facilitated one Caribbean Community (CARICOM) Single Market and Economy Skills Certificate and two work permit filings. Six Fiscal Incentives – benefits accessible to entertainers who apply and are registered in the National Registry of Entertainment and Creative Industries Practitioners – were approved.

Event Extensions

The Ministry granted 23 event extensions, compared with 61 extensions in 2019. This was due to the institution of States of Emergency (SOE) or Zones of Special Operations (ZOSO) in more areas, the increased enforcement of the Noise Abatement provisions, and the containment measures implemented to stem the spread of the COVID-19 virus. The events granted extensions resulted in expenditure of \$18.0 million and 1 294 temporary jobs.

Entertainment Grants

In support of entertainment events including Reggae Month activities, livestreamed concerts and acoustic sessions, the Ministry provided \$23.3 million in grants. Though the restrictions implemented resulted in cancellations of cultural exchanges, representatives from the Division participated in seven virtual international music and creative industry panels.

Intellectual Property (IP)

Work continued towards providing information for the copyright industries. Consultations were held with the licensing bodies of Collective Management Organizations (CMO)—Jamaica Association of Composers, Authors and Publishers Limited (JACAP) and the Jamaica Music Society (JAMMS)— to understand the challenges being experienced in the entertainment sector and to identify possible solutions. The initiatives implemented were primarily through virtual platforms directly related to promoting intellectual property rights to all citizens, of which the copyright industry is instrumental. The concerns aired at the consultative webinars included the:

- inability of JAMMS to advocate on behalf of performers, due to the absence of a provisions in the Copyright Act, 1993 to grant performers remuneration rights. The Act currently only allows JAMMS to manage the rights of record producers
- incorporation of the Marrakesh Treaty³ into the Copyright Act, which will give legal rights to entertainers with disabilities
- absence of a provision in the Copyright Act that allows non-exclusive licencees to institute legal proceedings exclusively on behalf of the copyright owners who are members of these CMOs.

The Jamaica Intellectual Property Organization essay competition as well as the Public Sensitization IP Campaign were launched during the IP WEEK of activities. JIPO continued to promote the Voluntary Copyright Registration Service to the copyright sector, which provides proof of deposit of copyrighted material that is evidenced by the issuance of a certificate for the material being registered.

The Patents and Designs Act, 2020

The Act was passed by the Senate in January. This replaces the Patent Act of Jamaica, 1857 and Designs Act, 1937 which were repealed in December 2019. The new law is expected to be enacted in FY 2021/2022. The Patents and Designs Act, 2020 seeks to align Jamaica with international standards as it replaces a system that granted patents based on local novelty to one in which the criteria of patentability is universal novelty. Changes in the Act includes conformity with standards on Trade-Related Intellectual Property Rights on what is eligible and excluded for patent, implementation of the Paris Convention on Industrial Property and provisions for the Patent Cooperation Treaty (PCT) that Jamaica intends to sign, as well as, provisions on ownership of patents, utility models and design rights between employers and employees. Patents will last for twenty years as opposed to the fourteen years in the previous Act, industrial designs must be new and have individual character, and inventors will also be able to obtain utility model protection, and provides for the possibility of opposition proceedings in respect of patents, utility models and designs.

Modernization of the Patent Directorate

The Inter-American Development Bank (IDB) approved funding to assist JIPO toward the securitization of IP, to include the digitization of the Patent files. The digitization

3. The Marrakesh Treaty administered by the World Intellectual Property Organization, makes the production and international transfer of specially-adapted books for people with blindness or visual impairments easier. It does this by establishing a set of limitations and expectations to traditional copyright laws.

of Patent information to the Industrial Property Automated System (IPAS) is to achieve full automation of all patent procedures, allow proper records management, access of JIPO's on-line services, which include conducting searches, submitting applications and making payments.

SPORT

Developments in the Sport sub-sector were directed by the National Sport Policy, in alignment with *Vision 2030 Jamaica – National Development Plan* and its associated MTF. Sporting programmes pursued included:

- the establishment of a National Results Framework and Monitoring and Evaluation System for Sport. Draft data collection instruments were developed for this system and a sub-committee of the Sport Thematic Group, comprising of researchers from four tertiary institutions, was established. As a result of the successful development of the system and use of the Sport and Sustainable Development Goals indicators as an early adopter, Jamaica was requested to make presentations at a number of international conferences in the area of Sport.
- the pursuing of plans for a National Sport Museum- A building concept for the Museum was created by an architect contracted by MCGES under the supervision of the UDC, with technical adjustments in progress based on results of a topographical survey. The contracting of other support professionals to complete the architectural drawings was being pursued.
- establishment of the Arthur Wint Centenary Scholarship - this scholarship was awarded to its first recipient. The scholarship provides support to a second-year student enrolled in a four-year degree programme at the GC Foster College for Physical Education and Sport. The scholarship includes tuition and accommodation for the remainder of the course of the programme.
- commissioning of the Doping Control Mobile Unit (DCMU) – Jamaica Anti-Doping Commission (JADCO) acquired a DCMU, the first such unit in the Caribbean. This unit is expected to enable JADCO to increase testing capacity, be compliant with the required international standards, and test in locations where conditions are unsuitable and unfavourable for doping control.
- development of a Sport Recovery Proposal - The MCGES developed and disseminated a “Sport Recovery Proposal” template for National Sport Associations and Federations in June. The template provided general guidelines for the resumption of sporting activities and encouraged the associations/federations to develop their own set of protocols (using the template as guide)

to indicate how the specific nuances of the respective sporting disciplines would re-invent the return of sporting activities. The document considered some general protocols for training, events/competitions, sport facilities and venues, illness management, transportation, travelling and accommodation

- activities related to sport infrastructure development
 - As part of its commitment to provide high quality playing surfaces, the MCGES, through the Sport Development Foundation (SDF), upgraded approximately 23 playing surfaces. These surfaces included those in schools, communities and the National Stadium.

BROADCASTING

The report containing recommendations outlining the strategy for Jamaica's Digital Television Switch-Over, which introduces a wide array of changes to the broadcasting sector, was accepted by Cabinet. The main recommendations included:

- a redefinition of broadcasting
- the criminalization of payola
- the inclusion of provisions to protect children and witnesses to crime when interfacing with the media
- additional provisions to address content standards and programming
- simplification of the licencing regime to improve the ways of doing business through a streamlined process and a single application form
- Subscriber Television (STV) rezoning and a transition to a tiered regulatory regime
- a specific mandate for the Broadcasting Commission of Jamaica (BCJ) to promote digital literacy
- additional responsibilities for the commission to regulate content across platform and devices.

Due to the pandemic, advertising and subscription revenues for broadcast licensees declined within the range of 35.0 per cent to 75.0 per cent. This resulted in staff layoffs, salary reduction and reduced operations. The Commission developed initiatives to respond to the pandemic, including:

- developing campaigns for traditional and social media to counter fake news and disinformation on the pandemic by bad actors both in Jamaica and elsewhere
- hosting a webinar series to educate the public about the opportunities and risks in the digital space to help them adjust to the rapid transition to online access to work, school, and services
- engaging licensees on the strategies and policy actions needed to mitigate the impact of COVID-19, including possible changes in the regulatory environment to assist licensees to adapt and survive

- expediting further research and policy recommendations on the Digital Television Switch-Over process, which is important to ensuring a viable future for the industry
- participating and leading a number of regional and international consultations, seminars and conferences on possible communications policy and regulatory responses to COVID-19.

The Commission collaborated with “Get Safe Online, UK”, one of the United Kingdom’s leading sources of information on online safety, for the development of the “Get Safe Online, Jamaica” website and the launch and implementation of the Get Safe Online Ambassador programme. The Commission also hosted island-wide workshops on online protection and safe use of digital media and trained ten ambassadors. BCJ also partnered with United Nations Educational, Scientific, and Cultural Organization (UNESCO) Cluster Office for the Caribbean to launch the Caribbean Artificial Intelligence (AI) Initiative, which explores the role of AI in the socio-economic development of Caribbean Small Island Developing States. The initiative explores new opportunities and threats of AI in the digital age and determine the role it may play in stimulating economic growth and job creation at the national and regional levels. The first event under the initiative hosted by the Commission in December, in the form of a webinar, “*Artificial Intelligence in the Caribbean Context: What are we talking about?*”

Expansion/ Investments

Subscriber Television (STV)

One new STV Operators (STVO)/cable licences was granted, while three operators renewed their licences. The number of STVOs was 49, providing service to the 243 zones on the island. Nineteen of these zones are served by the three all-island operators – CWC Communications (Flow), Digicel Jamaica Limited, and Digital Interactive Services Limited (Ready TV).

Broadcasters

The total number of broadcast radio stations remained at 28 as no new broadcast licences were granted and none were surrendered. Two broadcast radio stations renewed their licences while one application for renewal was being processed as at the end of 2020.

DIGITAL LITERACY

The BCJ made presentations to schools, church groups and participants in events organised by the Ministry of Education Youth & Information on the issues of media literacy and digital awareness. Though the COVID-19 pandemic resulted in fewer sessions due to the inability to physically meet, it resulted in the development of a robust online programme, which helped to increase reach with the limited sessions. The Commission conducted eight outreach sessions to approximately 60 200 primary, high, and tertiary level students, at which critical media and information relevant to youth were explored, including understanding and evaluating media content, internet addiction, managing screen time, digital footprint, cyber-bullying, sexting, careers in the digital economy, and social media opportunities and challenges.

Adult Digital Literacy

The Commission engaged nine new groups on a range of issues including understanding and evaluating media content, internet addiction, managing screen time, digital footprint, cyber-bullying, sexting and and the internet allowing for more opportunities for children to access pornography. To continue building the capacity of adults, especially parents, to detect and respond to challenges of the digital age, the commission made presentations to Parent-Teacher Associations, Tertiary Institutions and community groups.

Media Campaign

In support of the Commission’s strategic objective to protect vulnerable citizens and promote media and digital literacy, the ‘*What If*’ campaign was launched with two 60-seconds advertisements featuring school children addressing the issues raised by internet use. The infomercials encourage responsible and thoughtful media usage. BCJ’s advertisements on social media had 38 065 052 impressions (number of times shown), viewed approximately 5.7 million times, generated 32 232 social engagements (likes, shares, and retweets), and had a positive sentiment score of 73.0 per cent.

Confabs⁴

Four online webinars were held by the Commission on a range of matters including, “*Work Opportunities in a Changing Environment: During and Past COVID-19,*” “*Digital Transformation in a New Work Era,*” and “*Transitioning to a Digital Society,*” which were all supported by the UNESCO Information for All Programme.

4. A confab is an informal private conversation or discussion.

PERFORMANCE

RVA for 2019⁵

RVA for the Recreational Cultural and Sporting (RCS) Activities sub-industry grew by 2.7 per cent in 2019 (Figure 18A). This sub-industry accounted for 2.8 per cent of Total RVA in 2019, similar to the share in 2018 (Figure 18B).

Creative Industries Investment

Capital expenditure was facilitated for 21 local Film, Animation, and Music (FAM) local companies valued at \$138.5 million, down by 66.1 per cent relative to 2019. A total of 10 jobs were created.

Seventy eight film registrations were approved for local and international companies seeking to produce films, documentaries, commercials, TV shows, music videos

and special events in Jamaica. This compared with 93 approvals in 2019. Film Production Expenditure (FPE) was \$388.8 million and created 1 171 temporary jobs, a decline of \$2 013.9 million and 334 temporary jobs, respectively relative to 2019.

The direct economic impact of several activities was felt through linkages with a wide cross section of sectors including equipment rental, location scouting, locations fees, production management, accommodation, transit, catering, and customs brokerage. The Rebel Salute television production, the Clarks in Jamaica documentary, and Chronixx, H.E.R., Protoje, and Koffee music videos, were the largest scale productions undertaken, which combined, generated total value of \$46.4 million and created approximately 95 temporary jobs. Reggae Sumfest, an annual headline event, as well as other headline events

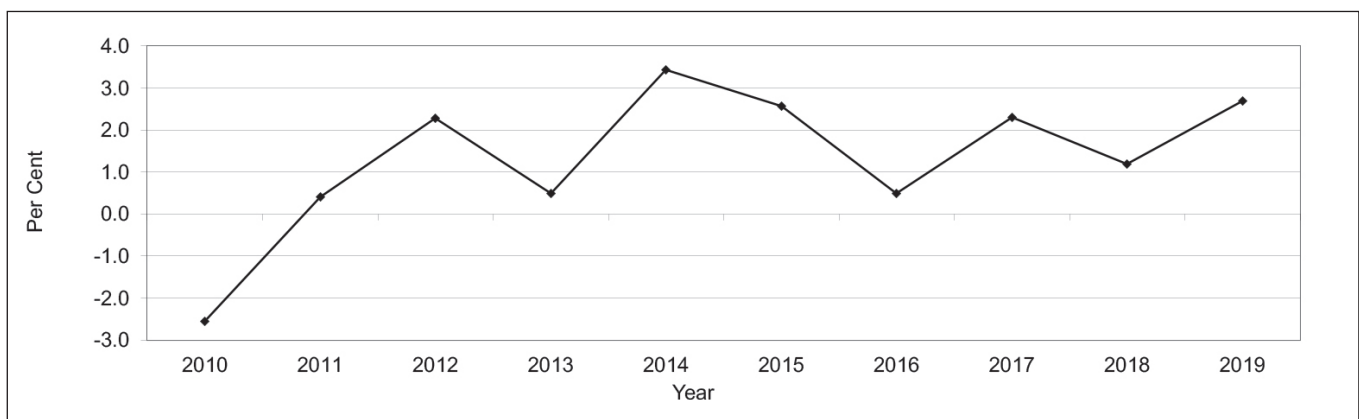


FIGURE 18A: PERCENTAGE CHANGE IN REAL VALUE ADDED FOR RECREATIONAL, CULTURAL AND SPORTING ACTIVITIES, 2010-2019

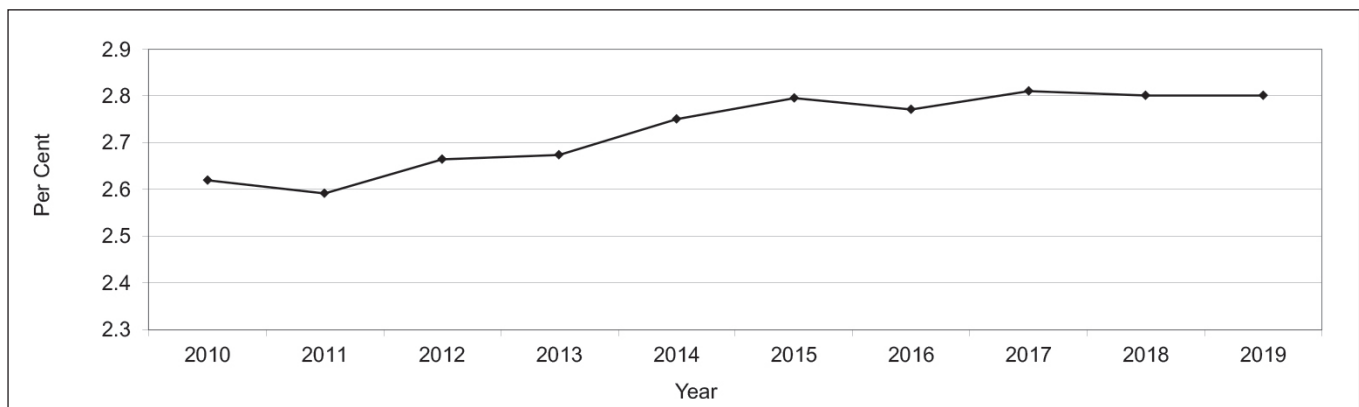


FIGURE 18B: SHARE OF RECREATIONAL, CULTURAL & SPORTS ACTIVITIES IN TOTAL REAL VALUE ADDED, 2010- 2019

5. Real Value Added for the RCS sub-industry is reported with a one year lag. The RCS Activities sub-industry accounted for 40.6 per cent of the Other Services Industry in 2019 and captures the majority of entertainment activities.

were cancelled due to the pandemic, and accounted for much of the contraction in the sector. An estimated 100 jobs and \$205.5 million were generated in 2019 by Reggae Sumfest. Local film productions that were registered contributed \$46.1 million in FPE and 128 jobs to the local economy.

Headline initiatives designed to support the creative industries continued and included:

- the Jamaica Film and TV Association (JAFTA) Propella short film development programme, sponsored by JAMPRO, JAFATA, the MCGES, and Phase 3 Productions, which provided a total of \$4.5 million in grant funding and training support to four filmmakers.
- the Export Max III Enterprise Development for Export Growth Programmes, launched in 2020, and sponsored by JAMPRO, the Jamaica Business Development Centre (JBDC), the Jamaican Manufacturer' and Exporters' Association (JMEA), the Foundations for Competitiveness and Growth Project (FCGP), Trade Management Services Limited, Jamaica Productivity Centre, Dewar Wiggan & Partners, Human Employment and Resource Training/National Service Training Agency Trust (HEART/NSTA Trust), Bureau of Standards Jamaica (BSJ) and Jamaica National Small Business Loans, which for the next three years, provide six creative industries companies with export training and grant support.
- The Caribbean Development Bank (CDB), through which its Creative Industries Innovation Fund awarded a US\$0.1 million grant to JAMPRO, to develop a model by 2021 whereby animation practitioners across the region may utilise Caribbean incentives and resources to collaborate business-to-business (B2B) and advance revenue-generating projects in the animation industry.

Motion Picture, Radio, Television & Other Entertainment Activities

Based on preliminary General Consumption Tax (GCT) data, real gross sales by entertainment categories declined by 53.9 per cent relative to 2019 (Table 18.1). This contraction was a reflection of lower sales recorded by all the entertainment categories, led by Motion Picture, Radio, Television & Other Entertainment Activities which accounted for the largest share of total gross sales. The decline in the category resulted from decreases in gross sales for the subcategories:

- Motion Picture and Video Production and Distribution by 87.6 per cent

- Other Entertainment Activities by 49.6 per cent
- Dramatic Arts, Music and Other Arts Activities by 44.2 per cent.

This contraction was however mitigated by an increase in gross sales for the Radio and Television Activities subcategory, by 13.4 per cent. There was a decline in gross sales to the Sporting & Other Recreational Activities category of 56.5 per cent, stemming from lower gross sales of 62.9 per cent and 29.9 per cent for the subcategories Other Recreational Activities and Sporting Activities, respectively. The category, Library, Archives, Museums & Other Cultural Activities, with the smallest share of total gross sales, recorded reduced gross sales of 27.5 per cent due to contractions in the subcategories Library and Archives Activities (35.2 per cent) and Botanical and Zoological Gardens and Nature Reserves Activities (12.7 per cent). News Agency Activities registered reduced gross sales of 13.8 per cent.

TABLE 18.1
PERCENTAGE CHANGE IN REAL GROSS SALES BY ENTERTAINMENT CATEGORY, 2020/2019

Category	%	
	Change	Share of Total Sales
Motion Picture, Radio, Television & Other Entertainment Activities	-57.4	57.47
News Agency Activities	-13.8	8.87
Library, Archives, Museums & Other Cultural Activities	-27.5	6.29
Sporting & Other Recreational Activities	-56.5	27.37
TOTAL	-53.9	100.00

Source: Compiled by the PIOJ from data provided by Tax Administration Jamaica

Motion Picture Receipts

Revenue earned by the Palace Amusement Company for the 2019/2020 financial year⁶ was \$919.6 million, a decline of \$193.1 million compared with 2018/2019. (Table 18.2). The lower revenue resulted from decreased inflows to the categories, Film Rental (\$113.3 million), Box Office Receipts (\$109.3 million), Confectionery Sales (\$61.1 million) and Screen Advertising (\$2.7 million). The reduction in Box Office Receipts was due to lower receipts from all cinemas, with the exception of Sunshine Palace, a new cinema which opened in Portmore, St Catherine in late June, 2019. Carib

6. The Financial Year for the Palace Amusement Company ends in June.

TABLE 18.2
SELECTED INDICATORS FROM PALACE AMUSEMENT COMPANY REVENUES, 2018/2019 & 2019/2020
(\$MILLION)

	Carib Cinema		Palace Cineplex		Palace Multiplex		Sunshine Palacae		Film Activities		Screen Advertising		Total	
	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020	2018/ 2019	2019/ 2020
Box Office Receipts	355.2	211.0	117.4	79.0	164.5	124.1	0.0	113.7					637.0	527.8
Confectionery Sales	186.7	113.3	54.5	36.9	72.4	53.0	0.0	49.3					313.6	252.5
Film Rental									443.5	330.2			443.5	330.2
Screen Advertising	26.8	21.3	11.8	9.5	17.5	13.9	0.0	9.8			33.9	32.8	90.0	87.3
Other Activities	0.0	2.0	2.0	6.3	0.2	6.0	0.0	5.6					2.2	19.9
Eliminations													-373.7	-298.1
Total Revenues													1112.6	919.6

Discrepancies in Table due to rounding

Source: Extracted from the 2019/2020 Financial Statements of the Palace Amusement Company

Cinema contributed the largest revenue to the Company (\$347.6 million).

Broadcasting

Financial Compliance

All STVOs are required by the BCJ to pay an annual licence fee equal to 5.0 per cent of gross subscription income. Of the 49 STVOs registered, 34.0 per cent made full payment, 9.0 per cent made partial payment, and 56.2

per cent were non-compliant compared with 49.0 per cent full payment, 14.0 per cent partial payment, and 37.0 per cent non-compliant in 2019.

Contacts Made to the BCJ

Members of the public contacted the BCJ 183 times relative to 244 contacts in 2019. During the first six months, 61 contacts were made and 122 contacts during July–December (Table 18.3). Of the total contacts made, 169 were queries related to operational issues pertaining

TABLE 18.3
NATURE & TOTAL NUMBER OF CONTACTS MADE TO THE BROADCASTING COMMISSION, 2019, 2020

	2020		Total
	Jan-June	July-Dec	
Licences Application Process	2	7	9
Complaints received and investigated	10	4	14
Poor STVO Technical Service	12	41	53
Poor Broadcast Television Technical Service	0	0	0
Concerns about removal of Channels and other Customer issues by Subscriber Television Operators	10	0	10
Poor STVO Customer Service	4	27	31
Other Operational Issues	23	43	66
Total	61	122	183
	2019		Total
	Jan-June	July-Dec	
Licences Application Process	7	12	19
Complaints received and investigated	11	18	29
Poor STVO Technical Service	20	22	42
Poor Broadcast Television Technical Service	12	4	16
Concerns about removal of Channels and other Customer issues by Subscriber Television Operators	15	0	15
Concerns about Ready TV maintenance Fees	2	0	2
Whether the Commission regulates online advertising	2	0	2
Poor Customer Service STVO	2	20	22
Exclusive Rights Issues	0	2	2
Other Operational Issues	47	48	95
Total	118	126	244

Source: Broadcasting Commission of Jamaica

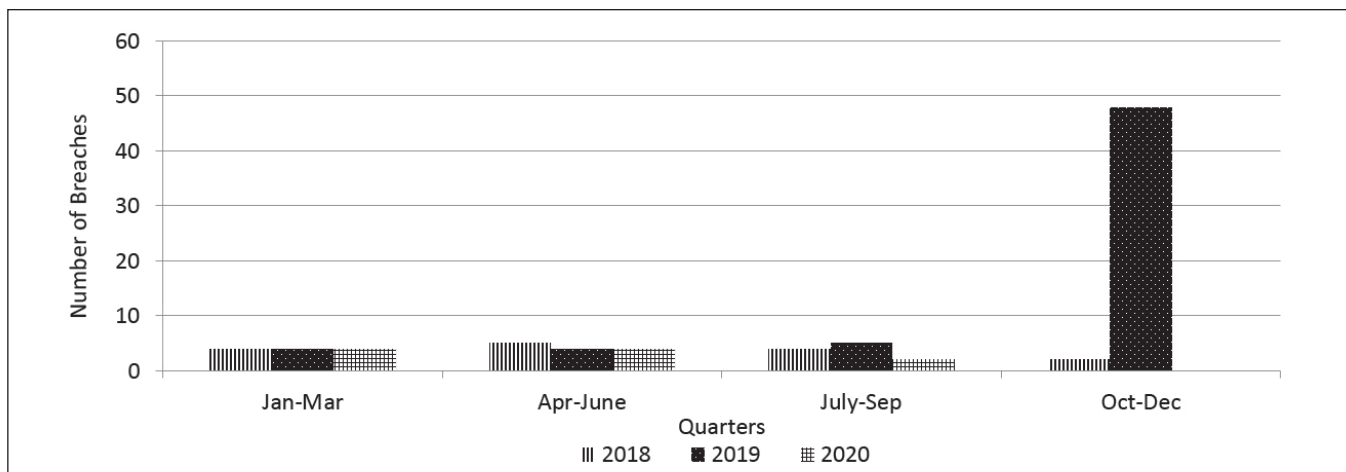


FIGURE 18C NOTICES OF BREACH ISSUED TO LICENCE OPERATORS BY THE BCJ, 2018-2020

to licenced operators and the work of the Commission while the remaining 14 contacts were complaints against broadcast radio and STVO.

Programming Content Compliance

The BCJ conducted 14 investigations into complaints on compliance with content standards, a decrease of 15 complaints relative to 2019. The transmission of profane language during the airing of songs and scheduled programme as well as songs, images, and advertisements of a sexually suggestive or explicit nature were the most frequent complaints (85.7 per cent).

Notices of Breach

Ten Notices of Breach relating to the broadcast of problematic content were issued by the Commission compared with 61 notices in 2019. The notices were issued to six broadcast radio operators and four broadcast television providers (Figure 18C). All of the breached were due to contravention of content standards by licensees while contravention of standards, failure to maintain technical standards, and breach of copyright were the reasons for notices of breach in 2019. The Commission may, depending on the investigation of the breach, direct the licensee to transmit an apology to the public, implement an internal remedial action accepted by the Commission, given a specific time frame within which to address the breach, or any other action approved by the Commission. The breaches by

licensees during the period related to transmission of graphic, profane, excessive, sexual language or content and were asked to issue an apology, or the Commission otherwise accepted the internal remedial action suggested by the licensee.

Amusement Licences

Municipal corporations issued a total of 2 738 licences for amusement events⁷ compared with 14 377 in 2019 (Table 18.4). This reflected a reduction in the number of licences given by all municipal corporations, with St Elizabeth recording the largest decrease (by 2 361) followed by Clarendon (by 2 038). This decline was attributed to measures implemented stem the spread of COVID-19 which resulted in the cancellation of a number of entertainment activities.

Revenues collected from those licences totalled \$16.4 million compared with \$81.1 million in 2019 (see Table 18.4). This reflected lower revenues collected by all municipal corporations, with St Elizabeth recording the largest decrease, followed by Portland.

Collective Management⁸ Organizations

Payments from royalties collected by the Jamaica Association of Composers, Authors and Publishers (JACAP)⁹ on behalf of its members declined from \$156.1 million in 2019 to \$108.3 million (Table 18.5). Net Overseas royalties were collected by JACAP and decreased from \$19.7 million to \$17.8 million.

7. At the time of writing, data from three municipal corporations were outstanding for 2020. Therefore comparison was done for 11 municipal corporations.
8. Collective management is the exercise of copyright and related rights by organizations acting in the interest and on behalf of the owners of rights.
9. JACAP was established in March 1998 to oversee the collective administration of music copyright in Jamaica and administer rights on behalf of songwriters, composers and publishers.

TABLE 18.4
AMUSEMENT LICENCES GRANTED & REVENUE COLLECTED, 2019–2020

	LICENCES ISSUED				REVENUE COLLECTED (\$'000)			
	2019	2020	Absolute Change	% Change	2019	2020	Absolute Change	% Change
Clarendon	2 472	434	-2 038	-82.4	6 024.70	1 709.60	-4 315.10	-71.6
KSAMC	n/a	n/a	n/ap	n/ap	n/a	n/a	n/ap	n/ap
Manchester	1 850	299	-1 551	-83.8	7 847.50	900	-6 947.50	-88.5
St Elizabeth	2 756	395	-2 361	-85.7	15 680.50	1 913.00	-13 767.50	-87.8
Hanover	655	144	-511	-78.0	2 572.50	508.50	-2 064.00	-80.2
St Catherine	1 428	247	-1 181	-82.7	6 495.70	964.50	-5 531.20	-85.2
St Thomas	1 467	339	-1 128	-76.9	9 031.00	2 058.00	-6 973.00	-77.2
Westmoreland	n/a	n/a	n/a	n/a	n/a	n/a	n/ap	n/ap
Trelawny	728	129	-599	-82.3	3 106.50	760.30	-2 346.20	-75.5
Portland	1 337	266	-1 071	-80.1	9 403.80	1 461.60	-7 942.20	-84.5
St Ann	1 272	375	-897	-70.5	10 212.40	3 666.00	-6 546.40	-64.1
St Mary	n/a	n/a	n/ap	n/ap	n/a	n/a	n/ap	n/ap
St James	18	16	-2	-11.1	5 855.30	1 470.50	-4 384.80	-74.9
Portmore	394	94	-300	-76.1	4 865.70	963.90	-3 901.80	-80.2
TOTAL	14 377	2 738	-11 639	-81.0	81 095.6	16 375.90	-64 719.70	-79.8

Source: Municipal Corporations

TABLE 18.5
PAYMENT OF ROYALTIES DISBURSED BY JACAP,
2018-2020 (\$MILLION)

	2018	2019 ^r	2020 ^p	Abs Change	% Change
Total Monies Disbursed by JACAP	134.2	156.1	108.3	-47.8	-30.6
Incoming Royalties to JACAP					
Overseas Net	13.8	19.7	17.8	-1.9	-9.6

p – preliminary

r – revised

Source: Jamaica Association of Composers, Authors and Publishers

Jamaica Music Society (JAMMS)¹⁰

Gross income received by JAMMS fell from \$104.7 million in 2019 to \$96.6 million. This contraction reflected lower collection from two of three income categories. Broadcasting, Webcasting & Cable Income declined from \$81.5 million to \$65.0 million while Public Performance Income decreased from \$49.6 million to \$18.2 million. However, Other Income (Foreign Royalties) increased to \$13.4 million from \$9.6 million, tempering the decline in Gross Income. Royalty outflow to foreign rights-owners fell from \$20.0 million to \$18.5 million.

Financing to the Entertainment Sector

At the end of December 2020, the outstanding stock of Loans and Advances to the Entertainment sector at

Commercial Banks totalled \$2 494.2 million, which accounted for 0.3 per cent of the total stock of Loans and Advances at Commercial Banks, similar to the share in 2019. This was a decline of \$255.4 million in the stock of Loans and Advances to the Entertainment sector by Commercial Banks relative to 2019 (Figure 18D).

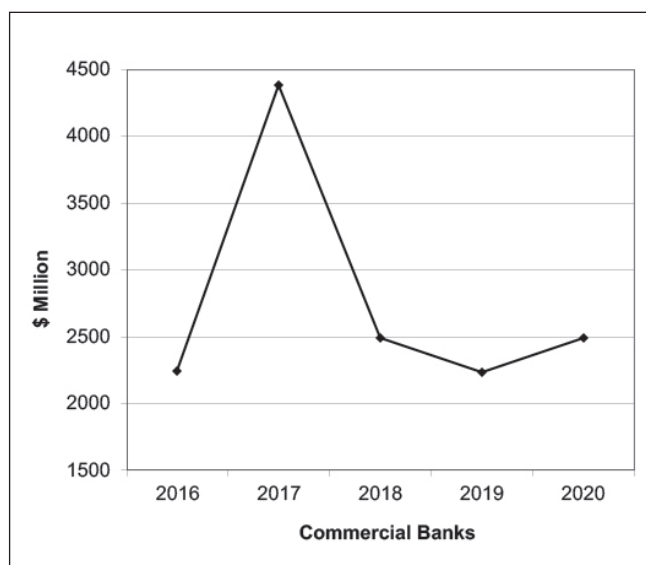


FIGURE 18D: STOCK OF LOANS AND ADVANCES TO THE ENTERTAINMENT INDUSTRY, 2016-2020

10. JAMMS' primary objectives are to administer rights on behalf of record companies and record producers who own the copyright in recorded music and to ensure that all music users engaged in "playing music publicly" or broadcasting music are duly authorized by obtaining the relevant Licence/Permit.

TABLE 18.6
PROJECTS FUNDED BY SDF 2016-2020
(\$MILLION)

	2016	2017	2018	2019	2020	2020/2019	
						Absolute Change	% Change
Expenditure on Infrastructure Projects							
Courts	53.4	35.1	38.8	26.1	33.4	7.3	28.0
Fields	2.0	17.8	26.1	53.2	60.5	7.3	13.7
Fences/Walls	2.9	3.5	17.0	8.8	3.3	-5.5	-62.5
Clubhouses, Complexes & Lighting	18.6	6.6	11.3	4.8	38.6	33.8	704.2
Equipment, Signs & Other Projects	n/a	n/a	n/a	n/a	1.8	n/a	n/a
Seats	n/a	n/a	n/a	n/a	30.4	n/a	n/a
High Schools Sport Infrastructure Improvement Programme (HSSIIP)	43.9	8.4	27.1	10.0	n/a	n/a	n/a
National Projects	0.1	62.4	43.6	4.8	12.7	7.9	164.6
TOTAL	120.9	133.8	163.9	107.7	180.7	73.0	67.8

Source: Sports Development Foundation Limited

SPORTING & OTHER RECREATIONAL ACTIVITIES

Government Funding to Sporting Activities

Total income received by the Sports Development Foundation (SDF) increased to \$622.5 million from \$543.4 million in 2019. This increase was a result of higher income from two of three income categories, Income from Gaming (by \$63.6 million to \$600.4 million) and Other Income (by \$15.4 million to \$16.9 million). The category Investment Income fell from \$5 186 thousand to \$5 170 thousand.

Total expenditure by the SDF declined from \$639.3 million to \$562.7 million, reflecting lower expenditure for the following five of seven expenditure categories:

- National Associations from \$210.3 million to \$158.0 million
- Special Allocations Fund from \$104.3 million to \$56.9 million
- Assistance to Sporting Events from \$30.8 million to \$0.5 million
- Athletes Welfare Grants and Other Grants from \$42.2 million to \$19.1 million
- Grants to Government Agencies from \$43.1 million to \$38.5 million.

Higher expenditure was recorded for the categories Infrastructure Projects, which increased to \$180.7 million from \$107.7 million and Administrative Expenses to \$109.2 million from \$101.0 million (Table 18.6). The increase in expenditure to Infrastructure Projects was facilitated by the reallocation of funds resulting from the cancellation of sporting events. Moreover, the Disaster Risk Management Order exempted construction activities and allowed work to be done during curfew hours while adhering to the physical distancing protocols.

Disbursements to Infrastructure Projects, National Associations and Administrative Expenses were the

main expenditure categories. Combined, these expenses combined represented 79.6 per cent of total expenditure. Total Disbursements to National Associations and Government Agencies fell from \$253.4 million to \$196.6 million (Table 18.7). This decrease reflected reductions from \$210.3 million to \$158.2 million and \$43.1 million to \$38.4 million in outlay to National Associations and Government Agencies, respectively. Among National Associations, the Jamaica Football Federation (JFF) continued to receive the largest financial allocation, followed by the Jamaica Athletic Administrative Association (JAAA). With regard to Government Agencies, the lower allocation reflected zero payments to the Social Development Commission compared with 5.0 million in 2019 (see Table 18.7).

Football

Before all sporting activities were either cancelled or postponed due to the impact of COVID-19, the JFF hosted one international friendly football match with Bermuda. This match was held on March 11, 2020 with 406 patrons in attendance. Gate receipts from this match totalled \$513 000.0 while expenses were \$1.7 million. Sponsorship to the JFF declined from \$184.3 million in 2019 to \$89.5 million.

Cricket

A number of cricket activities took place during the year. To facilitate these activities, the Jamaica Cricket Association (JCA) received sponsorship totalling \$164.6 million compared with \$230.6 million in 2019. Expenditure during 2020 totalled \$177.8 million compared with \$280.3 million in 2019. The regional cricket body, Cricket West Indies, contributed \$163.4 million as support to the JCA compared with \$209.7 million in 2019.

Revenue and expenditure were disaggregated as follows:

- local events with sponsorship of \$3.1 million and expenditure of \$26.7 million
- national teams (males and females of different age

TABLE 18.7
SPORTS DEVELOPMENT FOUNDATION DISTRIBUTION OF GRANTS, 2019-2020
(\$MILLION)

ASSOCIATIONS	2019 ^F	2020 ^P	Absolute Change	% Change
Amateur Swimming Association	5.9	2.6	-3.3	-55.9
Association of Sports Medicine	1.3	2.0	0.7	53.8
Equestrian Federation	1.3	1.3	0.0	0.0
Jamaica Athletic Administrative Association	31.0	25.6	-5.4	-17.4
Jamaica Amateur Basketball Association	5.6	3.8	-1.8	-32.1
Jamaica Amateur Bodybuilding Association	1.5	2.3	0.8	53.3
Jamaica Amateur Gymnastics Association	3.5	1.9	-1.6	-45.7
Jamaica Amateur Softball Association	1.8	1.3	-0.5	-27.8
Jamaica Badminton Association	3.1	2.0	-1.1	-35.5
Jamaica Bobsleigh Federation	0.9	0.7	-0.2	-22.2
Jamaica Boxing Board of Control	2.4	2.4	0.0	0.0
Jamaica Chess Federation	3.5	1.3	-2.2	-62.9
Jamaica Cricket Association	16.7	13.2	-3.5	-21.0
Jamaica Cricket Umpires Association	1.1	0.0	-1.1	-100.0
Jamaica Cycling Federation	1.8	1.8	0.0	0.0
Jamaica Darts Association	1.0	0.7	-0.3	-30.0
Jamaica Deaf Sports Association	1.3	1.3	0.0	0.0
Jamaica Football Federation	62.3	46.3	-16.0	-25.7
Jamaica Golf Association	2.3	3.9	1.6	69.6
Jamaica Hockey Federation	2.1	2.1	0.0	0.0
Jamaica Intercollegiate Sports Association	0.4	0.8	0.4	100.0
Jamaica Netball Association	17.3	9.7	-7.6	-43.9
Jamaica Paralympic Association	2.6	2.0	-0.6	-23.1
Jamaica Rifle Association	0.7	0.7	0.0	0.0
Jamaica Rowing Federation	1.0	1.0	0.0	0.0
Jamaica Rugby League	1.0	1.0	0.0	0.0
Jamaica Rugby Union	2.6	1.8	-0.8	-30.8
Jamaica Skeet Club	0.0	1.0	1.0	n/a
Jamaica Ski Federation	0.0	0.0	0.0	n/a
Jamaica Squash Association	2.3	2.8	0.5	21.7
Jamaica Surfing Association	2.0	1.5	-0.5	-25.0
Jamaica Table Tennis Association	2.7	0.0	-2.7	-100.0
Jamaica Triathlon Association	1.0	0.7	-0.3	-30.0
Jamaica Visually Impaired Cricket Association	2.1	1.6	-0.5	-23.8
Jamaica Volleyball Association	3.8	2.1	-1.7	-44.7
Multicare Foundation	2.8	2.8	0.0	0.0
National Domino Bodies	2.9	0.9	-2.0	-69.0
Special Olympics of Jamaica	5.5	3.5	-2.0	-36.4
Seido Karate Association	0.9	0.6	-0.3	-33.3
Tae-Kwon Do Association & Federation	2.6	1.8	-0.8	-30.8
Tennis Jamaica	4.8	4.0	-0.8	-16.7
World Bridge Federation	0.1	0.0	-0.1	-100.0
	1.1	1.4	0.3	27.3
Total Disbursements	210.3	158.2	-52.1	-24.8
Government Agencies				
G.C. Foster College	n/a	0.3	n/a	n/a
Independence Park Limited	17.1	17.1	0.0	0.0
Institute of Sport	21.0	21.0	0.0	0.0
Social Development Commission	5.0	0.0	-5.0	-100.0
Total Government Agencies	43.1	38.4	-4.7	-10.9
Total Disbursements (Associations & Government)	253.4	196.6	-56.8	-22.4

Source: Sports Development Foundation Limited

TABLE 18.8
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION INCOME, 2015/2016-2019/2020
(J\$ '000)

	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2019/2020 2018/2019	
						Absolute Change	% Change
Gear Sponsor	161 979.3	179 455.4	172 585.4	214 990.3	163 759.9	(51 230.4)	-23.8
IAAF Grants/Programme	4 987.3	3 299.1	806.2	2 332.3	677.9	(1 654.4)	-70.9
IAAF Refund (Doha)	n/a	n/a	n/a	7 093.9	2 683.2	(4 410.7)	-62.2
SDF Grant	70 522.7	28 000	24 000.0	34 500.0	22 400.0	(12 100.0)	-35.1
World Cup (UK)	n/a	n/a	n/a	30 786.2	n/a	n/a	n/a
Other Sponsors	23 526.5	15 984.1	15 030.0	17 259.3	n/a	n/a	n/a
Gate / Programme Receipts	16 554.5	6 163.9	2 680.5	5 314.0	n/a	n/a	n/a
Broadcast Rights	2 431.2	1 300.0	1 000.0	1 200.0	n/a	n/a	n/a
Returns from meets	710.8	3 820.4	1 169.2	2 001.7	248.2	(1 753.5)	-87.6
Other Income	6 827.0	11 781.5	13 245.2	3 457.2	3 181.2	-276.0	-8.0
Total Income	287 539.3	249 804.4	230 516.5	318 934.9	192 950.4	(125 984.5)	-39.5

Source: Extracted from the Annual Report of the Jamaica Athletics Administrative Association

groups) with sponsorship of \$102.1 million and expenditure of \$81.3 million

- regional matches with sponsorship of \$59.5 million and expenditure of \$69.8 million.

Track and Field

Total income collected by the JAAA declined from \$318.9 million to \$192.9 in the 2019/2020 financial year¹¹ (Table 18.8). The largest decrease in income was recorded by Gear Sponsor from \$215.0 million to \$163.8 million, followed by

SDF Grant from \$34.5 million to \$22.4 million. These two categories also accounted for the largest shares of total income (Gear Sponsor, 84.9 per cent and SDF Grant, 11.6 per cent).

Total Expenditure decreased from \$299.8 million in 2018/2019 to \$84.0 million as several events were cancelled or postponed due to COVID-19 (Table 18.9). International Competitions recorded the largest reduction in expenditure from \$101.7 million to \$12.0 million, followed by Regional Competitions from \$70.2 million to \$5.6 million and National Championships from \$35.5 million to \$1.0 million. The largest contributors to total expenditure were Other Expenses (\$35.1

TABLE 18.9
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION EXPENDITURE, 2015-2020
(J\$'000)

Expenditure	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2019/2020 2018/2019	
						Absolute Change	% Change
Athletes Assistance	37 813.4	19 444.0	7 483.4	2 440.1	5 227.3	2 787.2	114.2
National Championships	34 023.4	34 865.8	32 510.4	35 514.2	1 044.6	(34 469.6)	-97.1
Secretariat Office	10 465.2	11 647.3	12 792.5	12 985.4	17 891.9	4 906.5	37.8
Competitions:							
Local	8 074.3	9 649.5	10 127.3	9 244.3	3 291.4	(5 952.9)	-64.4
Regional	24 566.7	40 622.7	25 159.6	70 176.5	5 596.9	(64 579.6)	-92.0
International	36 808.7	79 184.6	73 513.6	101 702.1	11 992.8	(89 709.3)	-88.2
Cross Country-NACAC	1 872.7	4 699.8	18 097.4	1 621.3	174.7	(1 446.6)	-89.2
Camps	1 408.0	176.8	75.0	289.0	0.0	-289.0	-100.0
Seminars / Training	1 657.1	1 209.5	475.8	13 534.0	706.1	(12 827.9)	-94.8
Other Expenses	25 656.9	40 450.4	39 718.4	18 341.6	35 116.8	16 775.2	91.5
Puma Team Gear	35 980.0	58 992.0	21 152.0	30 071.8	0.0	(30 071.8)	-100.0
JAAA Special Project	302.0	4 217.0	4 348.0	3 847.1	2 925.3	-921.8	-24.0
Total Expenditure	218 628.4	305 159.4	245 453.3	299 767.4	83 967.8	(215 799.6)	-72.0

Source: Extracted from the Annual Report of the Jamaica Athletics Administrative Association

11. The JAAA's financial year is October 1–September 30.

million), Secretariat Office (\$17.9 million) and International Competitions (\$12.0 million). Combined, these three categories accounted for 77.4 per cent of the total expenditure.

OUTLOOK

The Other Services industry of which the RCS sub-industry represents the largest portion, is forecast to grow in 2021. This expectation is predicated on the improvement of the economy from the impact of COVID-19. Measures implemented by the government are expected to stem the spread of the virus. As the virus is subdued, it is anticipated that the economy will be fully re-opened. Consequently, the staging of entertainment and sport events is expected to resume, as well as successful efforts to increase local investments in the sector and the transition of marketing companies into original productions, resulting in increased economic activity.

The Broadcasting Commission Jamaica, in its quest to build capacity within the sector and help prepare the country for the Fourth Industrial Revolution, aims to achieve the following during 2021:

- implement a research programme to address issues outlined in the Strategic Research Agenda including accessibility for the disabled as well as inter-governmental collaboration to address cross-sectional work
- administer legislation to modernize the regulatory framework, including fairness between regulated services and those that are currently unregulated, involving independent programme providers.

Digital Television Switchover (DSO)

The BCJ intends to implement the accepted recommendations for the DSO, including the provision of projects management support as well as licencing of a multiplex operator, which should facilitate the provision of additional television channels.

Review of the Children’s Code for Programming

The Children’s Code for cross-platform applicability is being redesigned by the BCJ. This includes a review of existing regulations, revisions of ratings, scheduling provisions and the criteria within categories, addressing advertising as well as risky behaviour inducement in content and proposing new guidelines or regulations for the Independent Programme Providers.

Digital Literacy Skills Framework

In collaboration with UNESCO, the BCJ will establish a Digital Literacy Skills Framework for Jamaica. This intends

to aid the development of digital literacy in the era of the fourth revolution as a regulatory tool for the protection of vulnerable citizens as well as to generate data to support digital literacy benchmarking across countries with similar goals. On completion of the project, BCJ will make policy recommendations in relation to education, training, employment, digital safety and media literacy within the framework of Vision 2030 as well as a paper prepared for publication in the International Telecommunications Union’s Digital Skills Insights.

Within the Sport sector, a number of initiatives are slated for implementation with the objective of driving economic activity within the sector. Some of these programmes are as follows:

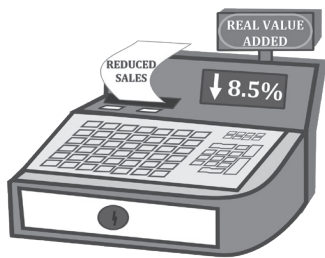
- the implementation of the Results Framework to include a data mapping exercise and collection of baseline data; publication of the first “State of Sport Report”; and reporting of Sport Policy initiatives. An additional \$10.0 million was requested in the budget for Fiscal Year 2021/22 to fund a study on the contribution of sport to employment and GDP, “State of Sport Report”. The study will contribute to the body of research towards measuring the contribution of sport to national development, based on the National Results Framework and the Monitoring and Evaluation system crafted in collaboration with the Commonwealth Secretariat.
- the reallocation of funds and presentation of a proposal to implement a COVID-19 Sport Relief Programme at a cost \$25.0 million. The proposal was to utilize the CARE Programme platform to administer the COVID-19 relief programme for the sport sector.
- the group health, life and personal accident insurance plan for national level athletes, the Jamaica Athletes Insurance Plan (JAIP), will facilitate the provision of psychological support to athletes. Under the group health component, athletes enrolled on the plan may benefit from a maximum of 24 visits to access psychiatric care. A series of workshops were also being finalised through Optimization Hub, which is a global centre that provides mental resilience and agility curriculum targeting athletes.
- The resumption of the Athletes Assistance Programme was being pursued for implementation in March 2021 for athletes preparing for the Olympics and April 2021 for Paralympians.
- JADCO’s intention to pursue its ISO 9001 certification, which is an international standard by which organizations demonstrate their ability to consistently provide products and services that meet customer and regulatory requirements. ■

WHOLESALE & RETAIL TRADE; INSTALLATION AND REPAIR OF MACHINERY

INTRODUCTION

The Wholesale & Retail Trade; Repair and Installation of Machinery (WRTRIM) industry recorded a decline of 8.5 per cent in Real Value Added (RVA) and accounted for 17.5 per cent of total RVA in 2020 (Figure 19A). The overall out-turn in the industry was negatively impacted by the Coronavirus Disease 2019 (COVID-19) pandemic through measures adopted to mitigate the spread of the disease, including nightly curfews and limits on gatherings. Consequently, the industry's performance was based on an overall decline in economic activity, influenced by:

- a reduced employed labour force by an average of 64 567 individuals, as well as a decline of 5 800



- individuals in the WRTRIM industry
- lower RVA in the Goods Producing industries
- a reduction in merchandise imports
- reduced consumer and business confidence, evidenced by a 16.7 per cent decline in the annual average of the Consumer Confidence Index and a 16.1 per cent decline in the annual average of the Business Confidence Index.

An examination of preliminary General Consumption Tax (GCT) data revealed that there was a real decline¹ of 11.4 per cent in total sales. This decrease in sales was due to a decline in seven of the eight categories, led by Textiles, Clothing, Shoes & Jewellery (30.4 per cent); Minerals, Fuels, Lubricants & Petroleum Products (26.6 per cent); and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores (15.3 per cent). Combined, the declining categories accounted for 89.4 per cent of total sales. A further decline in sales was curtailed by increased sales of 5.8 per cent for the category

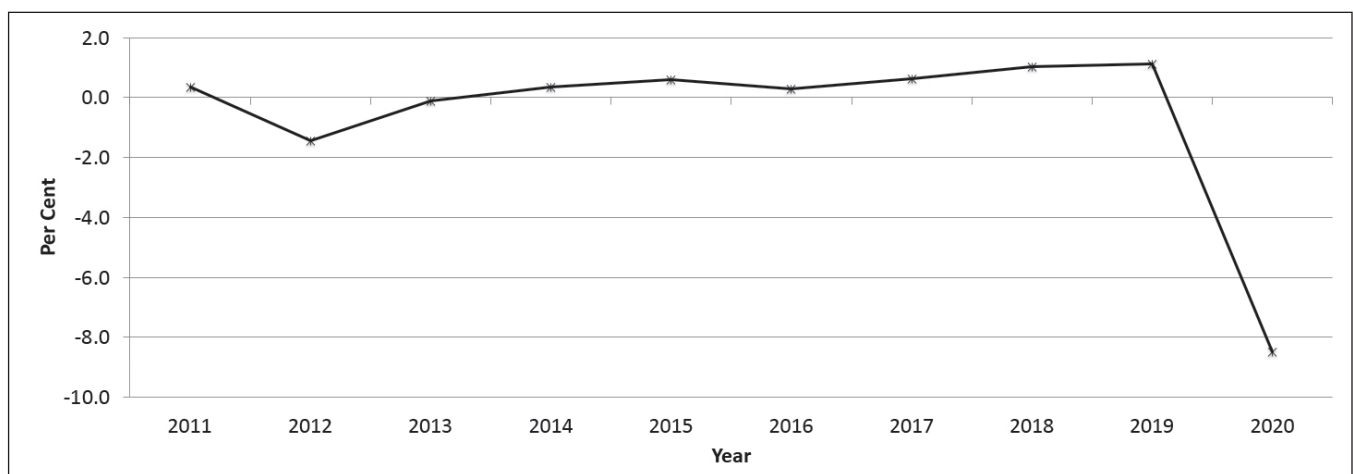


FIGURE 19A: REAL VALUE ADDED GROWTH RATES OF WHOLESALE & RETAIL TRADE; REPAIR AND INSTALLATION OF MACHINERY INDUSTRY, 2011–2020

1. Unless otherwise stated all changes are in real terms, discounted by the average Consumer Price Index (CPI) for the respective periods.



Hardware, Building Supplies, Electrical Goods & Machinery.

A contributing factor, which curtailed the decline in the industry was a real increase of 1.1 per cent in the value of Automated Banking Machines (ABM) and Point of Sales (POS)

transactions combined, despite a decrease by 8.9 per cent in the volume of transactions. Additionally, a real increase of 22.2 per cent in remittance inflows compared with 2019 also assisted in tempering the industry's decline.

POLICY AND REGULATION

Ministry of Industry, Investment & Commerce (MIIC)

The operations of the WRTRIM industry are regulated by MIIC, and executed through the Fair Trading Commission (FTC); Consumer Affairs Commission (CAC); Bureau of Standards Jamaica (BSJ); National Compliance & Regulatory Authority (NCRA); and Trade Board Limited (TBL). The initiatives to continue the facilitation of efficient trade; improve doing business for distributors; and improve consumer experience were continued during 2020. Associated with this and following the approval of the National Quality Policy (NQP)² in 2019, the Ministry commenced the process for the establishment of the National Quality Policy Council (NQPC). The primary objective of the Council will be to provide policy oversight and the governance required for the National Quality Infrastructure's (NQI) to deliver reliable, competent and essential services. This will be in line with international norms and best practices, as well as the Technical Regulations Code of Practice, which was finalized and submitted for approval as a deliverable under the NQP.

Work on the development of the National Consumer Protection Policy was delayed due to budgetary constraints. However, through continued requests from MIIC and the Consumer Affairs Commission (CAC) it is expected that funding will be received in FY2021/22.

Related to the 15th meeting of the Council for Trade

and Economic Development (COTED) of CARICOM, the Ministry submitted and received approval for the suspension of the Common External Tariff (CET) and for Jamaica to apply a 0.0 per cent rate of duty on 1 500 metric tonnes of red kidney beans for the period May 6, 2020 to April 30, 2021. This application was due to the inability of Belize—the producing regional member state—to supply the commodity.

Fair Trading Commission (FTC)

A central role of the FTC is to undertake investigations linked to the conduct and compliance of businesses under the provisions of the Fair Competition Act, 1993. In the execution of its duties, the FTC received 24 complaints for five breach types relative to 53 complaints for six breach types in 2019 and 137 requests for information compared with 99 in 2019 (Table 19.1). Complaints disaggregated by breach type, indicated that Misleading Advertising accounted for the largest number of complaints at 15, compared with 37 in 2019. Related to sectors, most complaints were for Automobile (seven) while Telecommunications and Household Appliances & Accessories, each recorded three complaints.



Cases investigated by the FTC totalled 84 compared with 156 in 2019. An examination by breach type revealed that, similar to 2019, the breaches Misleading Advertising (down 69 investigations to 49) and Offences Against Competition (up 1 investigation to 23) combined, accounted for the majority of the investigations. These accounted for 85.7 per cent of investigations relative to 89.7 per cent in 2019. Assessed by sector, 29 investigations were related to Telecommunications and 18 investigations were related to Automobile.

The FTC closed 19 cases representing a decline of 77 cases compared with 2019. For breach type, Offences Against Competition and Misleading Advertising had eight and seven closed cases, respectively (see Table 19.1). By sector, four cases were closed for Automobile and two each for Energy, Food/Supplements & Beverages, and Telecommunications.

2. The NQP will aid in the development of the NQI, through which Jamaica can provide the required evidence of compliance with the relevant standards and regulations. The vision of the NQP is that Jamaica will have a national framework for the development of a sustainable “Standards-Led: Market Driven” economy, supported by a culture of high quality to achieve global competitiveness and consumer protection.

TABLE 19.1
CASES INVESTIGATED AND COMPLETED BY THE FTC, 2019–2020

BREACH/INVESTIGATION	2019 ^r			2020		
	RECEIVED	INVESTIGATED	CLOSED	RECEIVED	INVESTIGATED	CLOSED
Abuse of a Dominant Position	0	3	1	0	2	0
Agreements That Substantially Lessen Competition	0	1	0	0	1	0
Double Ticketing	0	0	0	0	0	0
Misleading Advertising	37	118	84	15	49	7
Misleading Advertising/ Offences Against Competition	1	1	0	1	2	0
Misleading Advertising/ Sale Above Advertised Price	0	0	0	0	0	0
Not Under the Act	2	3	2	0	1	0
Offences Against Competition	7	22	4	5	23	8
Price Fixing	0	0	0	0	0	0
Request For Opinion	3	5	4	2	3	1
Sale Above Advertised Price	3	3	1	1	3	3
Tied Selling	0	0	0	0	0	0
TOTAL	53	156	96	24	84	19

r - revised

Source: Fair Trading Commission

Bureau of Standards Jamaica (BSJ)

Following Cabinet approval for the legal establishment of the NCRA, a Bill was drafted. The review process for the Bill continued and a 4th draft is expected for review by January 2021. Further activities regarding the revision of the BSJ's governing legislation will resume after the NCRA Bill is completed and passed. During 2020, the BSJ embarked on new initiatives, as well as continued work on existing programmes, these included:



- *Assisting food stakeholders to achieve compliance with the US Food Safety Modernization Act (FSMA) and the Safe Food for Canadians Act* – due to the impact of COVID-19 no physical inspections by the US Food and Drug Administration (FDA) of Jamaican food facilities were conducted. Notwithstanding, 17 stakeholders in the food industry were assisted in meeting requirements of the FDA regarding the registration of their facilities and nutritional labelling. Additionally, in October the BSJ hosted a webinar on the amended food and nutrition labelling regulations. At the session, FDA officials provided 98 attendees with information on the amended labelling requirements for products imported into the United States of America.
- *Accreditation of Laboratories* – accreditation provides assurance of the analytical capabilities of the laboratories and their staff as well as the integrity and

scientific validity of test results. It remains critical to maintaining access to the markets of existing trading partners and aids in gaining entry into new markets. The total number of accredited tests offered by the BSJ remained at 48. The Chemistry, Packaging and Metallurgy laboratories successfully transitioned to the 2017 version of the ISO/IEC 17025 standard, while the Microbiology Laboratory successfully underwent a surveillance audit and maintained its accreditation to the 2017 version of the ISO/IEC 17025 standard. The Jamaica National Agency for Accreditation (JANAAC) was the accreditation body for all four laboratories.

NUMBER OF ACCREDITED TESTS BY LABORATORY
Microbiology – 25
Chemistry – 20
Metallurgy – 2
Packaging – 1

- *Support to Agro-Processing* – 17 members of the Jamaica Agro-Processors Association (JAPA) were provided with discounts valued at \$965 860.39 on laboratory testing and label assessment services.
- *COVID-19 Response* – the BSJ migrated all stakeholder engagement and training sessions to virtual modalities and increased promotion of their four online training courses (Good Manufacturing Practices, Introduction to Risk Management, Hazard Analysis Critical Control Point (HACCP) and Understanding & Interpreting ISO 9001:2015). The BSJ also developed and published a standard for instant hand sanitizers (JS 351:2020).

- *Consumer Health and Safety* – activities related to consumer health and safety included:
 - Front of package labelling (FOPL) – reviewed the draft CARICOM Regional Standard for the Labelling of Pre-Packaged Foods
 - Improving Household Nutrition Security and Public Health Project³ – received and tested 120 samples of baked products for sodium, potassium, total sugar, cholesterol and transfat and all results were sent to the University of Technology, Jamaica
 - Regional Energy Efficiency Labelling – developed three regional standards (CRS 57, CRS 58 and CRS 59) to govern the minimum energy performance of refrigerators, air conditioners and lights (compact fluorescent lamps and light-emitting diodes). A review of CRS 57 revealed it did not include the classification of the Energy Efficiency Index (EEI) of refrigerators, which is critical information for the Regional Energy Efficiency Label. To address this shortfall the BSJ generated test data (through the Energy Efficiency Testing Laboratory) on energy consumption of refrigerators to inform the EEI classification for the standard.
 - Quality and health standards for food and beverage packaging – BSJ facilitated the adoption of the ASTM D6954 Standard Guide for Exposing and Testing Plastics that Degrade in the Environment by a Combination of Oxidation and Biodegradation to ensure that the requisite quality and health standards were in place for the alternatives to the banned plastic solutions for the packaging of food and beverage products. Additionally, work commenced on the development of the Jamaican Standard Specification for Oxo-biodegradable plastic.

NATIONAL COMPLIANCE AND REGULATORY AUTHORITY (NCRA)

In order to safeguard the health and safety of consumers, the NCRA is responsible for registering pre-packaged food establishments, importers and manufacturers of goods for which compulsory standards exist, inspecting goods at the ports of entry and in the domestic marketplace, as well as verifying weighing and measuring devices used in trade and conducting petrol sampling. In executing these

responsibilities, the NCRA implemented and facilitated the registration of importers and local manufacturers of hand sanitizers, and continued the registration of hollow concrete block factories. For the year, 13 certificates of registration were issued to eight importers and five manufacturers of hand sanitizers and 60 block factories were registered across the island.

As it relates to inspections, 4 811 site visits were made relative to 6 355 visits in 2019. The total number of visits was affected by imposed curfews, particularly in St Catherine, and the general restriction of movement associated with protocols implemented to mitigate the spread of COVID-19. Sites inspected were:

- Ports of Entry – 228 visits, a decline of 236 visits and included inspections at Kingston Freeport Terminal Limited; Kingston Wharves; Norman Manley International Airport; Sangster International Airport; Montego Bay Freeport; Seaboard Freight; Cold Storages; and Bonded Warehouses
- Domestic Market – 3 536 visits, a decline of 967 visits and included assessment of goods at supermarkets; shops; wholesales; pharmacies; gas station convenience stores; and furniture, appliance, hardware and department stores
- Importer/Distributor warehouses – 786 visits, a decline of 356
- Manufacturing Facilities (block and hand sanitizer factories) – 261 visits, an increase of 15 visits and included the inspection of manufacturing facilities and practices. Of note, the increased usage of hand sanitizers due to COVID-19 led to the addition of site visits to these factories.

A total of 1 402 consignments were inspected at the ports of entry and the premises of importers/distributors. Of this total, the share of goods that did not conform to the stipulations of the Standards Act, 1968, was 2.1 per cent (30 consignments). This compared with 2 765 consignments in 2019 and a non-compliance rate of 2.5 per cent. The overall decline in the number of consignments inspected was due to the negative impact of COVID-19 on the number of shipments that came into the island during the first half of 2020. In the domestic marketplace, 5 249 product categories were inspected, of which 531 were withdrawn from sale relative to 2 647 product categories in 2019, of which 314 were withdrawn from sale. This translated to a non-compliance rate of 10.1 per cent in 2020 relative to 11.9 per cent in 2019.

3. See ESSJ 2019.

TABLE 19.2
CONSUMER AFFAIRS COMMISSION PERFORMANCE INDICATORS, 2016–2020

	2016	2017	2018	2019 ^r	2020	Percentage Change 2020/2019
Complaints Received	1 491	1 602	1 796	1 709	1 893	10.8
Complaints Settled	1 231	1 242	1 485	1 417	1 364	-3.7
Consumer Advice	785	553	956	716	555	-22.5
Monies Secured (\$'000)	14 375.3	21 344.0	30 965.4	19 825.1	21 325.2	7.6
Surveys	27	28	29	27	49	81.5

r - revised

Source: Consumer Affairs Commission

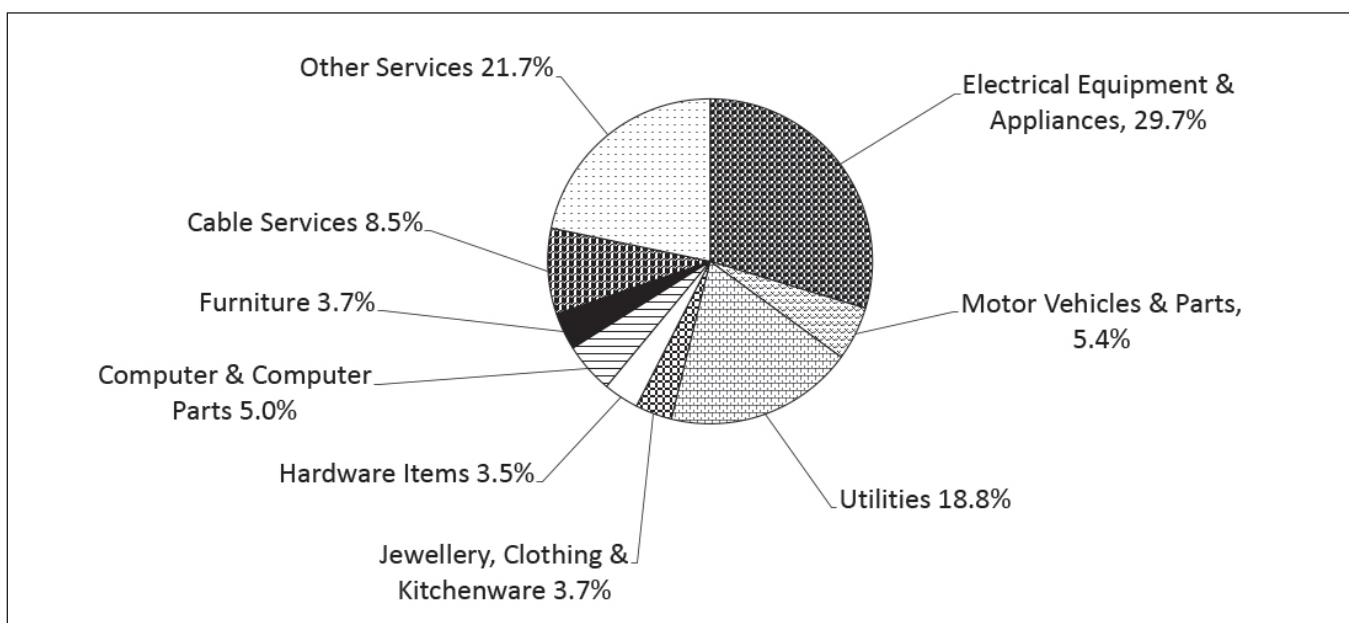


FIGURE 19B: COMPLAINTS RECEIVED BY THE CAC BY CATEGORY, 2020

Consumer Affairs Commission (CAC)

Guided by the Trade Act, 1955 and the Consumer Protection Act, 2005, the CAC seeks to inform, educate and empower consumers to protect themselves in the marketplace. This is executed through conducting market research predominantly in the form of price surveys, providing resolutions for complaints received and operating its consumer education programme.



Associated with providing information to the public and distributors, 13 consumer alert publications were completed and two Distributive Trade meetings convened. The consumer alerts provided price comparisons for

commonly used grocery items among supermarkets in major towns across the island, while the meetings provided an opportunity for the Commission and the MIIC to be informed about challenges facing distributors, specifically related to the COVID-19 pandemic. During the year, 49 price surveys were completed compared with 27 in 2019 (Table 19.2). This increase was partly attributed to the addition of 12 price surveys for sanitation & hygiene given the increased usage of these products as a result of the protocols in place to reduce the spread of COVID-19. The other main areas surveyed were petrol products (12) and grocery & agricultural products (9).

Complaints received by the CAC totalled 1 893 relative to 1 709 in 2019 (see Table 19.2). The largest share of this total was for Electrical Equipment & Appliances at 29.7 per cent compared with 31.6 per cent in 2019. Similar to 2019,

Other Services,⁴ (21.7 per cent) Utilities (18.8 per cent), and Cable Services (8.5 per cent) were the additional top categories (Figure 19B). The CAC received 555 consumer advice requests, a decline of 161 requests compared with 2019. The Commission settled/resolved 1 364 cases, down from 1 417 in 2019 and secured a total of \$21.3 million in refunds/compensation, an increase of 7.6 per cent relative to 2019.

Trade Board Limited (TBL)

TBL became the first of the 22 border regulatory agencies (BRAs) to be operationally plugged into the Jamaica Single Window for Trade (JSWIFT) Portal. JSWIFT is a transactional trade facilitation portal, which allows for online application (including uploading of support documents) payment and approval for import and export permits, as well as for the licensing/certification of new and used motor vehicle dealerships. The TBL export module was launched on June 22 and the import module on July 20.

Associated with the primary responsibility of TBL to issue import and export licenses, approval was issued for the importation of 50 437 motor vehicles with a total value⁵ of US\$446.5 million, a decline of 5 672 motor vehicles and US\$154.9 million compared with 2019. Disaggregated by vehicle type, 41 416 Cars & Light Commercial Vehicles were imported, 8 368 fewer than in 2019 and accounted for the largest share (82.1 per cent) of total vehicle importation. The remaining types Motor Cycles and Trucks (unladen weight greater than three tonnes) had total import of 6 577 (up 847) and 2 444 (up 1 849), respectively.

PERMITS ISSUED BY CATEGORY

BUSINESS	INDIVIDUAL
# OF PERMITS 673, declined by 33	# OF PERMITS 35, declined by 70
VALUE US\$83.0 million declined by US\$207.9 million	VALUE US\$0.1 million declined by US\$0.1 million

Non-motor vehicle imports were granted 708 permits valued at US\$83.0 million compared with 811 permits valued at US\$291.1 million in 2019. This reflected a decline in both the number of permits issued and value for the Business and Individual categories. The subcategory Games/Gaming Machines recorded the largest decline of 86 permits to 19. A further decline in the number of permits issued was tempered by increases in the subcategories Mechanical Equipment (by 32 permits to 70) and Firearms/Explosives/Ammunition (by 4 permits to 172).

PERFORMANCE

Industry Composition⁶

Preliminary GCT data revealed that Large firms accounted for 75.9 per cent, Medium firms 17.2 per cent,

TABLE 19.3
OUTPUT AND EMPLOYMENT TRENDS IN DISTRIBUTION, 2016–2020

	2016 ^r	2017 ^r	2018 ^r	2019 ^r	2020 ^p
Contribution to GDP (%)	17.4	17.3	17.2	17.2	17.5
WRTRIM Growth Rate (%)	0.3	0.6	1.0	1.1	-8.5
Overall GDP Growth (%)	1.5	0.7	1.8	1.0	-9.9
Persons Employed	238 425	238 125	242 525	240 533	234 733
Share of Total Employment (%)	20.3	19.8	20.0	19.3	18.7
Industry GDP per worker (constant 2007 prices, \$)	549 346.42	553 451.57	549 070.36	559 878.10	525 118.42

p - preliminary
r - revised

Source: Compiled by Planning Institute of Jamaica with data from the Statistical Institute of Jamaica

- Other Services include: complaints against individuals; payment difficulties; food & beverages; and chemicals, pharmaceutical & petroleum products.
- The value represents the value declared by the respective applicants via supporting documents when applying for the import license/permit. These may not be accurate or equivalent to the final valuation at Jamaica Customs Agency.
- Firms are categorized as: Micro – registered firms with an annual turnover of less than \$15 000 000.00; Small – firms with an annual turnover of between \$15 000 000.00 and \$75 000 000.00; or Medium and Large – businesses with an annual turnover of over \$75 000 000.00.

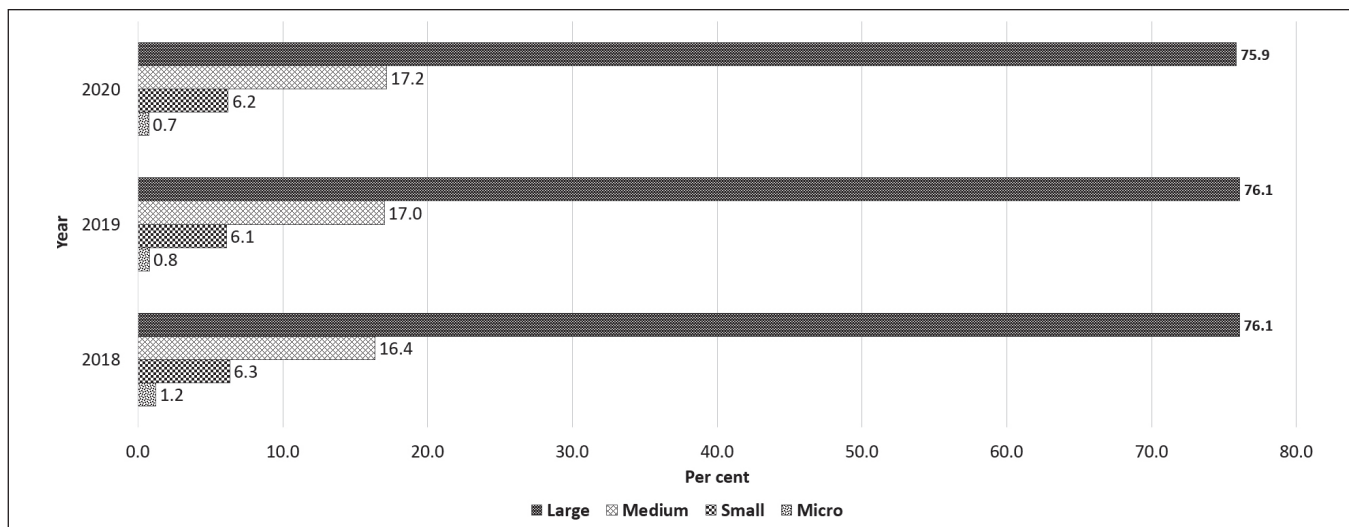


FIGURE 19C: SHARE OF TOTAL SALES BY FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2018–2020

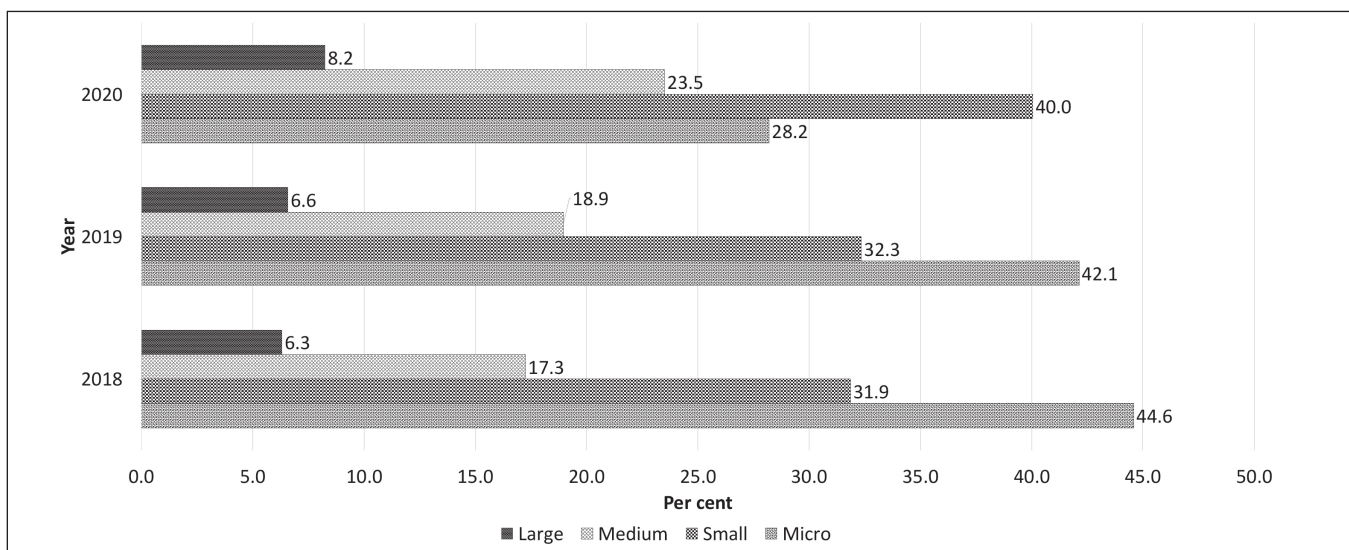


FIGURE 19D: SHARE OF FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2018–2020

Small firms 6.2 per cent, and Micro enterprises 0.7 per cent of total sales (Figure 19C). Compared with 2019, these out-turns reflected respective increases of 0.2 percentage point and 0.1 percentage point for Medium and Small and decreases of 0.2 percentage point and 0.1 percentage point for Large and Micro relative to 2019.

The data also revealed that 28.2 per cent of firms that filed GCT returns for 2020 were Micro enterprises (down 13.9 percentage points) and 40.0 per cent were Small enterprises (up 7.7 percentage points). The remaining share was accounted for by Medium firms at 23.5 per cent (up 4.6 percentage points) and Large firms at 8.2 per cent (up 1.7 percentage points) {Figure 19D}.

Gross Sales by Registered Firms

An assessment and analysis of preliminary General Consumption Tax (GCT) data showed that real gross sales for 2020 declined by 11.4 per cent. All goods categories declined except Hardware, Building Supplies, Electrical Goods & Machinery, which increased by 5.8 per cent. The largest decreases were recorded by Textiles, Clothing, Shoes & Jewellery (30.4 per cent); Minerals, Fuels, Lubricants & Petroleum Products (26.6 per cent); and Other Wholesale and Retail Sale of Goods and Services in Specialized & Non-Specialized Stores (15.3 per cent) {Table 19.4}. Combined, the declining categories accounted for 89.4 per cent of total sales.

Distributors of *Motor Vehicles, Auto Repairs & Accessories* recorded a decrease in sales of 14.1 per cent. This performance was due to a decline in all subcategories, except *Sale, Maintenance & Repair of Motorcycle & Related Parts & Accessories*, which registered an increase of 26.1 per cent. The subcategories with lower sales were led by a decrease of 15.1 per cent for *Sale of Motor Vehicles* (the largest contributor to the category). The other subcategories, *Maintenance & Repair of Motor Vehicles* and *Sale of Motor Vehicle Parts & Accessories* recorded respective decreases of 8.2 per cent and 11.9 per cent.

Distributors within the *Minerals, Fuels, Lubricants & Petroleum Products* category reported the second largest decrease in sales, 26.6 per cent, and accounted for 17.4 per cent of total sales. Lower sales of 26.7 per cent, 26.9 per cent and 20.8 per cent were recorded for the subcategories *Retail Sale of Automotive Fuel; Retail Sale of Petroleum Products (excl Automotive Fuel)*; and *Wholesale of Solid, Liquid and Gaseous Fuels and Related Products*, respectively.

Sales by *Wholesale & Repair of Household Goods & Office Equipment* distributors recorded a contraction of 3.8 per cent, and accounted for 10.2 per cent of total sales. The decrease was due to lower sales for the subcategories *Retail Sale of Household Appliances, Articles & Equipment* (13.4 per cent); *Wholesale of Other Household Goods* (0.6 per cent); and *Repair of Personal & Household Goods* (0.3 per cent). Tempering the decline in the category was an increase of 2.1 per cent in the *Retail Sale of Computers, Office Furniture & Equipment* subcategory, linked to higher demand resulting from the work from home orders and virtual schooling associated with mitigating the spread of COVID-19.

Gross sales of the *Agriculture, Food, Beverages &*

Tobacco category declined by 0.7 per cent. The category accounted for 22.4 per cent of total sales. This out-turn was due to lower sales by the subcategories *Retail Sale of Predominantly Food, Beverages or Tobacco in Specialized Stores* (by 15.4 per cent) and *Wholesale of Food, Beverages & Tobacco* (by 2.1 per cent). These decreases outweighed increases in the *Wholesale of Agricultural Raw Materials & Live Animals* (by 6.6 per cent) and *Retail Sale of Predominantly Food, Beverages or Tobacco in Non-Specialized Stores* (7.0 per cent).

The smallest category, *Textiles, Clothing, Shoes & Jewellery* accounted for 1.1 per cent of total sales and had a decrease in sales of 30.4 per cent. This resulted from a reduction in sales of 26.6 per cent and 31.3 per cent in the subcategories *Wholesale of Textiles, Clothing & Footwear* and *Wholesale of Textiles, Clothing, Footwear & Leather Goods*, respectively.

Gross sales for the category *Pharmaceuticals, Medical Goods & Cosmetics* decreased by 2.1 per cent and accounted for the second smallest share (3.9 per cent) of the industry's sales. The decline in the category was due to the combined effect of a decrease of 2.8 per cent in the heavier weighted *Pharmaceuticals & Medical Goods* subcategory and an increase of 65.3 per cent in the *Cosmetics* subcategory.

The largest category, *Other Wholesale and Retail Sale of Goods and Services in Specialized and Non-Specialized Stores*, accounted for 23.9 per cent of the industry's sales. Distributors in the category recorded decreased sales of 15.3 per cent, due to declines in all subcategories:

- *Other Retail Sale in Specialized Stores* (by 23.4 per cent)
- *Retail Trade Not in Stores* (by 15.1 per cent)

TABLE 19.4
GROWTH IN GROSS SALES IN WHOLESALE & RETAIL TRADE; REPAIR & INSTALLATION OF MACHINERY, 2019–2020

Goods Category	Sales Growth (%)		Per Cent of Sales (%)	
	2019 ^r	2020 ^p	2019 ^r	2020 ^p
Motor Vehicles, Auto Repairs & Accessories	43.9	-14.1	10.4	10.4
Minerals, Fuels, Lubricants & Petroleum Products	33.3	-26.6	21.1	17.4
Wholesale & Repair of Household Goods & Office Equipment	45.0	-3.8	9.4	10.2
Agriculture, Food, Beverages & Tobacco	41.8	-0.7	20.4	22.4
Textiles, Clothing, Shoes & Jewellery	38.7	-30.4	1.4	1.1
Hardware, Building Supplies, Electrical Goods & Machinery	35.7	5.8	8.7	10.6
Pharmaceuticals, Medical Goods & Cosmetics	42.0	-2.1	3.5	3.9
Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores	7.7	-15.3	25.1	23.9
TOTAL	38.8	-11.4	100.0	100.0

p - preliminary

r-revised

Source: Estimated based on GCT data from Tax Administration Jamaica

- *Other Wholesale* (by 14.2 per cent)
- *Other Retail Sale in Non-Specialized Stores* (by 7.3 per cent)
- *Wholesale on a Fee or Contract basis incl. Commission Agents, Merchandise & Commodity Brokers* (by 2.8 per cent).

The only increase in sales, 5.8 per cent, was recorded by the goods category **Hardware, Building Supplies, Electrical Goods & Machinery**, which accounted for 10.6 per cent of total sales. This predominantly resulted from an increase of 6.5 per cent in the heaviest weighted subcategory (93.1 per cent), *Retail Sale of Hardware, Paint & Glass*. The increase in this subcategory may be attributed to increased activities in the Construction industry during the last two quarters of the year.

Employment

The average⁷ number of persons employed within the WRTRIM industry was 234 733 persons, representing a decrease of 5 800 persons (Table 19.3). With a share of 19.9 per cent of the total employed labour force, the industry continued to be the largest single employer. A disaggregation by sex showed that the share of males employed increased by 0.7 percentage point to 47.0 per cent compared with 2019. The average RVA per worker—a measure for labour productivity—within the industry decreased from \$559 878.10 to \$525 118.42 (see Table 19.3).

Financing

An analysis of the stock of Loans & Advances at Commercial Banks showed there was an increase in the stock of loans for both distributors and consumers.

Distributors recorded an increase of 7.3 per cent (2.0 per cent in real terms) to \$81.4 billion in their stock of Loans & Advances compared with the stock at the end of December 2019 (Table 19.5). The stock of Loans & Advances to consumers increased by 8.7 per cent, 3.3 per cent in real terms, to \$507.5 billion. As at December 2020, the stock of Loans & Advances to consumers and distributors at commercial banks, combined, accounted for 63.4 per cent of the total stock relative to 65.1 per cent at the end of December 2019.



The stock of Loans & Advances at institutions licensed under the Financial Institutions Act (Amendment), 2004 increased for both distributors and consumers. The stock for distributors rose nominally by 14.5 per cent (8.8 per cent in real terms) to \$225.8 million and for consumers the stock of Loans & Advances increased by \$347.8 million to \$626.0 million. As at the end of December 2020, the stock of Loans & Advances for distributors and consumers, combined, accounted for 52.1 per cent of the total stock compared with 29.8 per cent at the end of December 2019.

MERCHANDISE IMPORTS

For the year, preliminary data showed there was a US\$1 691.0 million decline to US\$4 712.4 million in international merchandise trade compared with 2019. This was due to declines in all product groups, except *Machinery*

TABLE 19.5
LOANS & ADVANCES OUTSTANDING TO FIRMS IN WRTRIM AND TO CONSUMERS, 2016–2020 (\$MILLION)

	2016	2017	2018	2019	2020	2020/2019	
						Nominal	Real
Commercial Bank Loans to:							
Distribution	53 327.4	59 804.9	66 543.8	75 857.6	81 394.8	7.3	2.0
Consumers	224 349.1	320 169.3	397 645.9	466 790.2	507 488.4	8.7	3.3
F.I.A. Institutions to:							
Distribution	2 703.4	87.5	138.1	197.3	225.8	14.5	8.8
Consumers	7 689.9	99.4	154.3	278.2	626.0	125.0	113.8

Source: Bank of Jamaica

7. Average employment represents data for January, July and October of 2019 and 2020. This reflects the implementation of a change in Jamaica's Industrial Classification from 2005 to 2016, which has implications for the industry group composition. At the time of writing comparable data were available for January, July and October.



✪ *Transport Equipment and Manufactured Goods*, which increased by 9.9 per cent to US\$73.3 million and 1.9 per cent to US\$36.5 million, respectively. The declining product groups were led by, in absolute terms:

- *Miscellaneous Manufactured Articles* (by US\$842.5 million to US\$884.2 million)
- *Other* (by US\$352.4 million to US\$1 111.9 million)
- *Crude Materials (excl. Fuels)* (by US\$152.0 million to US\$418.6 million)
- *Animal & Vegetable Oils & Fats* (by US\$144.7 million to US\$629.4 million).

GLOBAL WHOLESALE & RETAIL TRADE

The global economy contracted due to declines in both Advanced and Emerging Market Economies, resulting from the impact of COVID-19 on economic activities.



Consequently, reduced global trade was reflected in an overall decrease in demand and investment.

Personal Consumption Expenditure (PCE) in the United States of America recorded a decline of 3.9 per cent compared with 2019 and contributed 2.6 percentage points to the overall 3.5 per cent decline in the US economy. The lower PCE was due to a decline of 7.3 per cent in the Services subcategory, which outweighed an increase of 3.9 per cent in the Goods subcategory. The decline in expenditure on Services was led by decreases in recreation services (by 31.8 per cent), transportation services (by 23.2 per cent), and food services and accommodations (by 21.8 per cent) as these were hardest hit by the impacts of COVID-19 and its hampering effect on the movement of people. The out-turn for the Goods subcategory reflected respective increased spending of 6.4 per cent and 2.6 per cent on Durable Goods and Nondurable Goods.

The Distribution, Hotels & Restaurants industry declined by 14.9 per cent in the United Kingdom compared

with 2019. The wholesale and retail trade component of the industry recorded a decrease of 6.7 per cent. The industry's performance was influenced by a 1.9 per cent decline in retail sales volume—the largest annual fall on record.

The Wholesale and Retail Trades industry in China recorded a decline of 1.3 per cent for calendar year 2020; Total Retail Sales of Consumer Goods decreased by 3.9 per cent. Disaggregated by consumption type, the income from Catering services decreased by 16.6 per cent, while the Retail Sale of Goods declined by 2.3 per cent. National online retail sales recorded a 10.9 per cent increase, of which online retail of physical goods rose by 14.8 per cent and accounted for 24.9 per cent of Total Retail Sales of Consumer Goods. In online retail sales of physical goods, higher sales were recorded for food (30.6 per cent), clothing (5.8 per cent), and consumer goods (16.2 per cent).

OUTLOOK

The WRTRIM industry is expected to record growth in 2021. This is largely predicated on the anticipated overall improvement in the economy relative to the downturn experienced in 2020 due to the impact of COVID-19. Additionally, expected growth in the related Construction, Manufacture, and Agriculture industries should support distributive trade activities. These combined will lead to an increase in demand and consequently higher gross sales. Also expected to have a positive influence on the industry's out-turn, is an anticipated increase in remittance inflows, lower interest rates on consumption loans and relatively stable inflation.



The full implementation of the NQPC will be facilitated by the MIIC through the selection and appointment of the membership from other relevant ministries, chairpersons of boards of NQI institutions, private sector consumer groups, academia and regulators as members, with the minister with responsibility for Commerce as the designated Chairman. Additionally, MIIC will host the inaugural meeting of the NQPC, which will establish the Sub-Working Groups & Implementation Framework to guide the implementation process of the NQP. A Technical Regulations Unit will be established within the BSI and monitored by MIIC. The implementation of measures for the development of a technical regulations regime and the training and sensitization sessions for the development of the technical regulations will also be undertaken.

Programmes, projects and other initiatives embarked on by the BSJ in 2020 will continue during 2021. In addition, the following will be implemented:

- *Accreditation of Laboratories* – the BSJ will submit applications to JANAAC in January 2021 for the accreditation of 19 tests to ISO/IEC 17025:2017 as follows: Concrete and Masonry Units Laboratories (six tests); Concrete Aggregates Laboratory (four tests); Cement Laboratory (seven tests); and Energy Efficiency Testing Laboratory (two tests)
- *COVID-19 response activities* – facilitate the review and potential adoption of varying standards associated with items utilized in the fight against the COVID-19 pandemic, including protective clothing, antibacterial soap (liquid and solid), and spacers and holding chambers for use with metered-dose inhalers. ■

DEMOGRAPHICS AND THE LABOUR MARKET

Population

The Labour Market

POPULATION

INTRODUCTION

Population dynamics (fertility, mortality and migration) are responsible for changes in population size, composition, distribution and age structure.¹ Countries that are more advanced in their demographic transition² are characterized by rapid population ageing and in some instances, population decline. Despite the challenges associated with population dynamics, several opportunities can also be derived for sustainable development. A decline in fertility, and childhood and adult mortality can contribute to an increase in the working-age population, induce a demographic dividend,³ and enable economic development. Internal and international migration play an important role in the reallocation of labour resources from areas of surplus to areas of need. Migration also fosters social and economic linkages between places of origin and destination. Governments, therefore, have a responsibility to implement appropriate policies to manage population dynamics, harness the benefits and reduce any adverse impact.

Jamaica continues to move towards the advanced stage of the demographic transition. Countries at this stage are characterized by low fertility and mortality rates, which have a direct effect on the population size and rate of growth. The demographic changes occurring in Jamaica are in keeping with these characteristics and are reflected in the declining child population (0–14 years), and increasing working-age group (15–64 years) and dependent elderly (65+ years) population. These shifts in the age structure, as well as other demographic changes have presented new opportunities for the furtherance of the country’s development agenda.

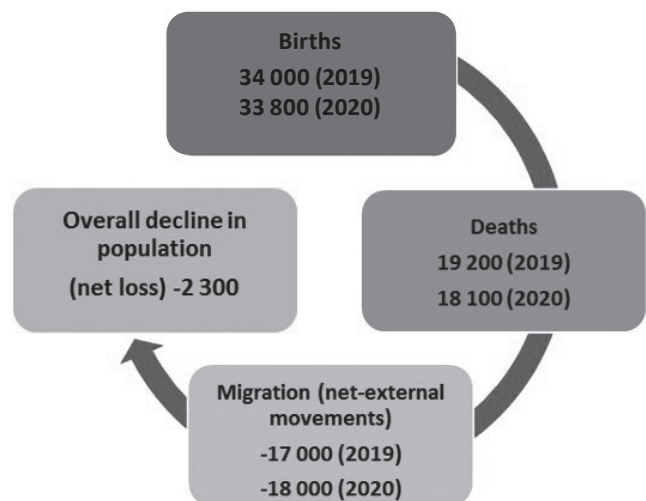
Given the population changes, work was advanced to revise the 1995 National Population Policy. The revised policy will be the strategic framework for guiding population and development initiatives up to 2030. This policy is expected to facilitate the integration of population

dynamics into all aspects of development planning and will be strategically aligned to Vision 2030 Jamaica – National Development Plan and the 2030 Agenda for Sustainable Development.

The coronavirus disease 2019 (COVID-19) is an epidemiological event that has affected the population. COVID-19 has had an impact on mortality trends, labour market participation, access to health care; education and mobility (see chapters on Health, Education and Labour Market). COVID-19 also contributed to delays seen in a number of planned activities, such as the fielding of the Population and Housing Census and the execution of the Reproductive Health Survey (RHS), which was last conducted in 2008.

POPULATION GROWTH AND SIZE

Fertility (births), mortality (deaths) and migration (emigration and immigration) have an impact on population growth. Additions are made to the population



1. Population age structure is defined as the proportion of the total population in each age group. See Population Reference Bureau, *Glossary of Demographic Terms* (2019).
2. Demographic Transition refers to a change from high birth and death rates to low birth and death rates in a society as a result of the shift from an agriculture-based population to an industrialized one. See Population Reference Bureau, *Glossary of Demographic Terms* (2019).
3. The demographic dividend can be defined as the economic growth potential that can be derived, owing to changes in a population’s age structure, chiefly when the share of the working-age population (15–64) is larger than the non-working-age (under 15, and 65 and older) share of the population. See Population Reference Bureau, *Glossary of Demographic Terms* (2019).

TABLE 20.1
POPULATION GROWTH STATISTICS, 2006–2020

Year	NUMBER					RATE (PER 1 000 POPULATION)							
	Population at end of year	Mean Population	Live Births	Deaths	Net External Movements	Natural Increase Col(4) - Col(5)	Net Increase Col(7) + Col(6)	Crude Birth Rate Col(4)/ Col(3)	Crude Death Rate Col(5)/ Col(3)	Net Migration Rate Col(6)/ Col(3)	Rate of Natural increase Col(9) - Col(10)	Annual Rate of Growth in percentages Col(8)/Col(3)	
1	2	3	4	5	6	7	8	9	10	11	12	13	
2006	2 657 800	2 653 000	43 200	19 000	-14 900	24 200	9 300	16.3	7.2	-5.6	9.1	0.4	
2007	2 667 200	2 662 500	43 400	20 500	-13 500	22 900	9 400	16.3	7.7	-5.1	8.6	0.3	
2008	2 676 700	2 671 900	43 100	20 000	-13 700	23 100	9 400	16.1	7.5	-5.1	8.6	0.4	
2009	2 686 100	2 681 400	42 800	18 900	-14 500	23 900	9 400	16.0	7.0	-5.4	8.9	0.4	
2010	2 695 500	2 690 800	40 500	21 500	-9 700	19 000	9 300	15.1	8.0	-3.6	7.1	0.3	
2011	2 704 100	2 699 800	39 700	16 900	-14 500	22 800	8 300	14.7	6.3	-5.4	8.4	0.3	
2012	2 711 500	2 707 800	39 600	17 000	-15 000	22 600	7 600	14.6	6.3	-5.5	8.3	0.3	
2013	2 717 900	2 714 700	38 500	17 400	-14 700	21 100	6 400	14.2	6.4	-5.4	7.8	0.2	
2014 ^r	2 715 700	2 716 800	37 000	19 600	-12 200	17 400	5 200	13.6	7.2	-4.5	6.4	0.2	
2015 ^r	2 719 500	2 717 600	37 900	19 300	-14 600	18 600	4 000	13.9	7.1	-5.4	6.8	0.2	
2016 ^r	2 721 700	2 720 600	36 200	19 800	-14 800	16 400	1 600	13.3	7.3	-5.4	6.0	0.1	
2017 ^r	2 725 900	2 723 800	34 400	19 700	-15 400	14 700	-700	12.6	7.2	-5.7	5.4	0.0	
2018 ^r	2 731 000	2 728 500	33 100	18 100	-15 900	15 000	-900	12.1	6.6	-5.8	5.2	0.0	
2019 ^r	2 734 100	2 732 600	34 900 ^a	19 200 ^a	-17 000 ^b	15 700	-1 300	12.7	7.0	-6.2	5.7	0.0	
2020 ^p	2 735 400	2 734 800	33 800 ^a	18 100 ^a	-18 000 ^b	15 700	-2 300	12.3	6.6	-6.6	5.7	0.0	

NOTE:

– Figures in Cols. 2–8 are approximated to the nearest hundred.

– Births and Deaths are based on events occurring in the year and registered up to 12 months after.

However, births and deaths represent events reported by the Registrar General's Department (RGD) and are adjusted for under-coverage by STATIN 2006–2018

– Discrepancies are due to rounding.

– All data are provisional and subject to change.

a – Data from STATIN were not available at the time of writing the 2020 publication. The population size was projected for 2020 by the PIOJ, using the annual rate of growth for 2018 and 2019. Birth and death data were received from the RGD (unadjusted).

b – Net External Movement is a proxy measure for Emigration and is based on movements of Jamaican nationals to and from the island in any given year, 2006–2018. The estimate for 2019 and 2020 was based on population projections.

p – Preliminary projected by PIOJ. The 2020 figures are based on projections calculated by the PIOJ and will be updated in accordance with the official estimates from STATIN when available.

r – revised

Source: STATIN, RGD and PIOJ's projections for 2020

by births and immigration, while subtractions occur through deaths and emigration.

Based on data received from the Registrar General's Department (RGD), there were 33 800 births and 18 100 deaths for the year, which resulted in a natural increase (births minus deaths) of 15 700. Net external movements of -18 000⁴ contributed to a net population loss of -2 300 (Table 20.1). There has been a declining trend in Jamaica's population average annual rate of growth for over a decade,

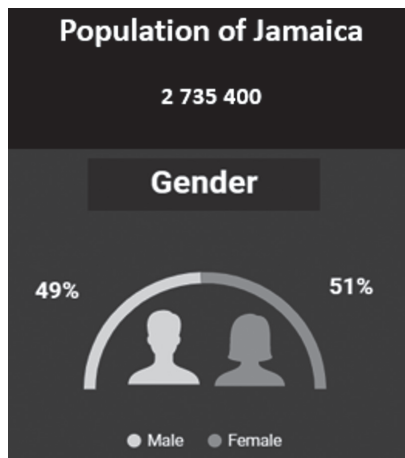
however, the reduction was more prominent in 2017 when zero growth was recorded for the first time. Jamaica's average annual rate of growth was estimated at 0.0 per cent in 2020. At the end of the year, the population was estimated at 2 735 400. Jamaica's population projections (medium variant) indicated that the population is expected to reach 2 872 000 by 2030, then decline to 2 819 000 by 2050.⁵

4. Statistical Institute of Jamaica, *Population Projections Jamaica 2000–2050* (Kingston: STATIN, 2008).

The estimate for 2019 and 2020 was based on population projections by the PIOJ.

5. Statistical Institute of Jamaica, *Population Projections Jamaica 2000–2050* (Kingston: STATIN, 2008).

POPULATION AGE AND SEX STRUCTURE



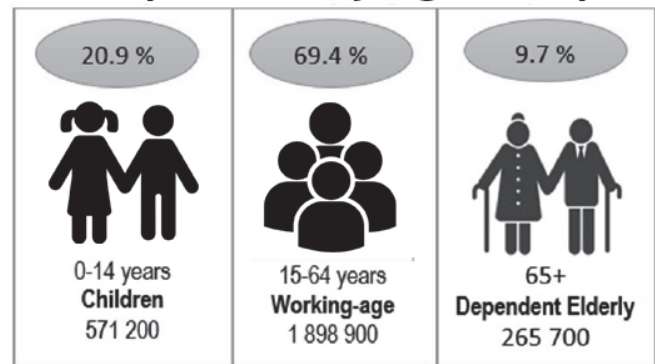
The Planning Institute of Jamaica projected⁶ the end-of-year population at 2 735 400, broken down as follows: 1 351 300 (49.4 per cent) males and 1 384 100 (50.6 per cent) females (Table 20.2). The sex ratio (male-to-female ratio) of 97.6 males per 100 females reflected a marginal

decrease (0.2 percentage points) since the corresponding period in 2019. Analysis of sex ratios highlights differences by broad age group. Typically, there are more males than females in the child population than in older age groups. The sex ratio for the 0–14 age group was 102.9 males per 100 females; while it was 97.4 males per 100 females in the 15–64 age group; and 89.5 males per 100 females in the 65 and over age group.

Jamaica's demographic profile is characteristic of an ageing population, evidenced by the median age⁷ of 30.2 years. Fertility, mortality and migration are primary determinants that cause shifts in Jamaica's population age structure. However, fertility has been shown to be the most influential determinant, as declining fertility is the greatest contributor to population ageing. The population is divided into three distinct groups: children (0–14 years); working-age population (15–64 years); and dependent elderly population (65+ years). The pattern of change of the population reflects a declining child population; an expanding working-age population; and a fast growing dependent elderly population.

The child population accounted for 20.9 per cent (571 200) of the total population in 2020, similar to the previous year (see Table 20.2). Population projections⁸ (medium variant) for Jamaica indicate that the child population will continue to decline up to 2050, stabilizing

Population by Age Group



at about 20.0 per cent of the total population. Two major implications of a sustained decline in the child population are: reduction in the total fertility rate to below replacement level fertility⁹ (i.e. below 2.1 children per woman) and increased proportions of the population at older ages, 15–64 and 65 years and older.

The working-age population (15–64 years) increased to 1 898 900 (69.4 per cent) of the total population, from 1 897 700 in 2019. The majority (1 384 100 or 50.6 per cent) was female (see Table 20.2). Population projections indicate that the working-age population should reach its maximum in 2020, then decline¹⁰ thereafter (Figure 20A). The data revealed that the elderly population (60+ years) remained essentially unchanged compared with the corresponding period last year. The 60+ population totalled 379 700 persons and represented 13.9 per cent of the total population in 2020 compared with 379 300 in the previous year. Females accounted for the majority (52.4 per cent) compared with their male counterpart. The proportion of the dependent elderly population (65+ years) also remained virtually unchanged, at 265 700 from 265 400 in 2019. As the fastest growing age group, considerable increases are expected in the dependent elderly population, as highlighted by the population projections up to 2050.

6. Data from STATIN were not available at the time of writing the 2020 publication. The population size was projected for 2020 by the PIOJ, using the annual rate of growth for 2018 and 2019. Birth and death data were received from the RGD (unadjusted).
7. The median age of an age distribution may be defined as the age that divides the population into two groups of equal size, one of which is younger and the other older than the median. It corresponds to the 50-percentile mark in the distribution. See David A. Swanson and Jacob S. Siegel, *The Methods and Materials of Demography* (California: Elsevier Academic Press, 2004), 158.
8. Statistical Institute of Jamaica, *Population Projections Jamaica 2000–2050*.
9. Replacement level fertility occurs when a woman has an average of 2.1 children who would replace the mother and father, once all children survived to reproductive age. The 0.1 is needed to offset the effects of premature mortality and the unbalanced sex ratio at birth. See Donald T. Rowland, *Demographic Methods and Concepts* (New York: Oxford University Press, 2003).
10. Statistical Institute of Jamaica, *Population Projections Jamaica 2000–2050*.

TABLE 20.2
POPULATION OF JAMAICA BY AGE AND SEX, END OF YEAR, 2016–2020

AGE GROUP	NUMBER									
	2016 ^r		2017 ^r		2018 ^r		2019 ^r		2020 ^p	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
TOTAL	1 347 100	1 374 500	1 348 800	1 377 100	1 350 900	1 380 100	1 352 100	1 382 000	1 351 300	1 384 100
TOTAL POP.	2 721 700		2 725 900		2 731 000		2 734 100		2 735 400	
0-4	94 000	90 500	91 300	88 000	89 200	85 900	88 300	84 700	88 300	84 800
5-9	103 000	100 600	100 900	98 700	98 800	95 600	95 800	92 300	95 800	92 400
10-14	110 600	108 200	108 700	106 300	107 500	105 600	105 900	103 800	105 900	104 000
15-19	127 000	122 300	123 600	118 800	120 700	115 700	117 100	112 000	117 000	112 200
20-24	136 100	131 900	136 000	132 300	132 400	129 300	128 800	125 100	128 700	125 300
25-29	120 600	120 400	122 000	120 900	124 900	122 700	127 800	124 400	127 700	124 600
30-34	105 000	111 800	105 700	111 200	107 400	111 700	110 600	114 300	110 600	114 500
35-39	84 900	94 900	89 200	98 800	93 700	102 600	96 500	105 300	96 500	105 500
40-44	80 100	91 600	77 700	89 700	76 800	89 200	77 200	89 100	77 200	89 200
45-49	80 700	84 500	81 200	86 700	79 600	87 000	77 900	87 700	77 900	87 800
50-54	76 000	73 500	75 400	74 900	76 000	76 800	75 500	77 400	75 500	77 500
55-59	64 300	65 400	67 200	66 100	68 500	66 900	69 700	67 400	69 700	67 500
60-64	48 400	48 400	51 300	52 000	53 700	54 800	55 900	58 000	55 900	58 100
65-69	40 600	39 600	40 900	39 800	41 200	40 800	42 000	41 600	42 000	41 700
70-74	29 300	30 200	30 500	31 300	31 800	32 500	32 800	33 800	32 800	33 900
75 & Over	46 400	60 700	47 500	61 800	48 800	63 100	50 100	65 000	50 100	65 200

AGE GROUP	PERCENTAGE									
	2016 ^r		2017 ^r		2018 ^r		2019 ^r		2020 ^p	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
TOTAL POP.	49.5	50.5	49.5	50.5	49.4	50.6	49.4	50.6	49.4	50.6
0-4	3.4	3.3	3.3	3.2	3.3	3.1	3.2	3.1	3.2	3.1
5-9	3.8	3.7	3.7	3.6	3.6	3.5	3.5	3.4	3.5	3.4
10-14	4.1	4.0	4.0	3.9	3.9	3.9	3.9	3.8	3.9	3.8
15-19	4.7	4.5	4.5	4.4	4.4	4.2	4.3	4.1	4.3	4.1
20-24	5.0	4.8	5.0	4.9	4.8	4.7	4.7	4.6	4.7	4.6
25-29	4.4	4.4	4.5	4.4	4.6	4.5	4.7	4.5	4.7	4.5
30-34	3.8	4.1	3.9	4.1	3.9	4.1	4.0	4.2	4.0	4.2
35-39	3.1	3.5	3.3	3.6	3.4	3.8	3.5	3.9	3.5	3.9
40-44	2.9	3.4	2.8	3.3	2.8	3.3	2.8	3.3	2.8	3.3
45-49	3.0	3.1	3.0	3.2	2.9	3.2	2.8	3.2	2.8	3.2
50-54	2.8	2.7	2.8	2.7	2.8	2.8	2.8	2.8	2.8	2.8
55-59	2.4	2.4	2.5	2.4	2.5	2.5	2.5	2.5	2.5	2.5
60-64	1.8	1.8	1.9	1.9	2.0	2.0	2.0	2.1	2.0	2.1
65-69	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
70-74	1.1	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.2	1.2
75 & Over	1.7	2.2	1.7	2.3	1.8	2.3	1.8	2.4	1.8	2.4

NOTE:

The age and sex proportions for 2019 was used to disaggregate the total projected population by age and sex for 2020.

p – Projections by the PIOJ for 2020, disaggregated by age and sex.

Discrepancies due to rounding

Source: Statistical Institute of Jamaica (STATIN) and internal PIOJ calculations

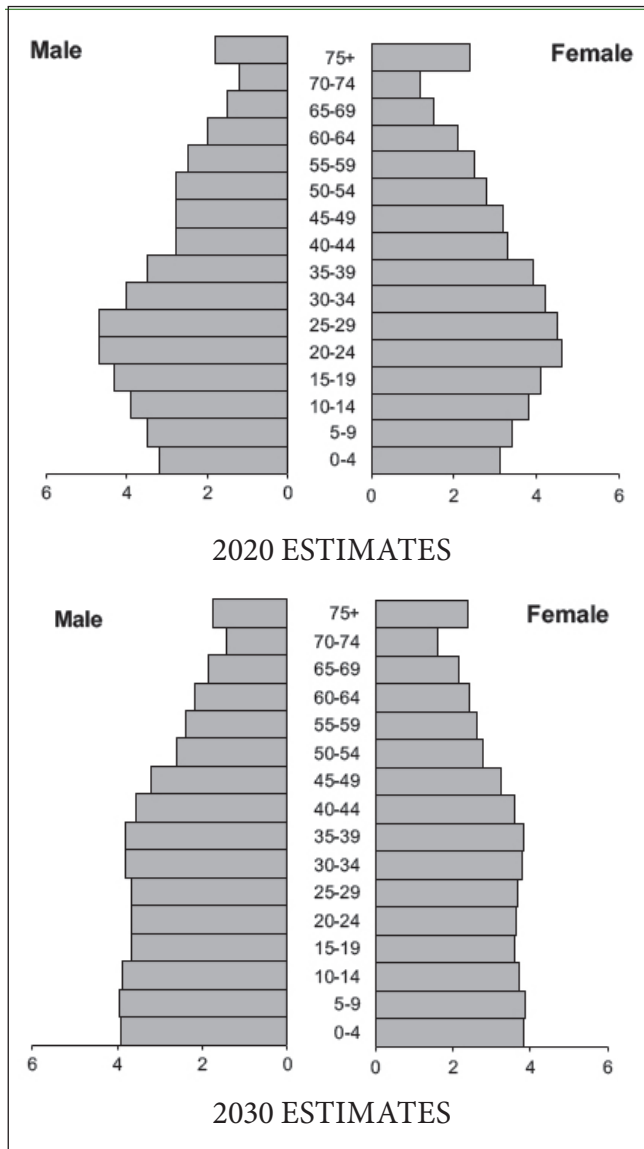
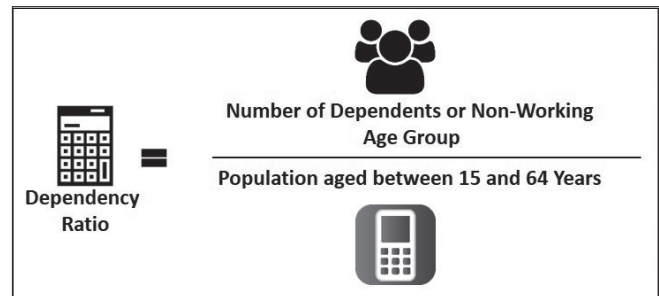


FIGURE 20A: PER CENT DISTRIBUTION OF POPULATION BY AGE AND SEX FOR 2020 AND PROJECTIONS FOR 2030

Age Dependency Ratio

Jamaica’s age dependency ratio (ADR) for 2020 was 44.1 dependents (child – 571 200, and dependent elderly – 265 700) per 100 persons of working age (1 898 900), similar to the previous period.

The ADR takes into consideration the total number of ‘dependents’, that is, children under 15 years and the dependent elderly (65+ years), relative to the working-age population (15–64 years). In other words, it shows the number of economically inactive people whom each



economically active person is expected to support. As the working-age population increases relative to the dependent ages, the age dependency ratio will decrease. A declining dependency ratio presents a window of opportunity, known as a ‘demographic dividend’.¹¹ Capitalizing on this dividend is time-sensitive, and leveraging the benefits is not automatic, but depends on implementation of appropriate social, economic and environmental development policies, programmes and plans aimed at human capital development and job creation. Jamaica is currently in this favourable demographic position for productivity and growth; to this end, work is advanced to revise the 1995 National Population Policy. In addition to other mechanisms, implementation of the revised policy will enable Jamaica to achieve the positive advantages of the demographic dividend, as one of the goals of the revised policy is to effectively mobilize the dividend to facilitate sustainable development.

FERTILITY AND FAMILY PLANNING

A goal of the 2009 Population Sector Plan, a component of Vision 2030 Jamaica - National Development Plan,¹² is for Jamaica to achieve and maintain replacement level fertility of 2.1 children per woman over the long-term. The country has developed policies and implemented strategies at national and sub-national levels to accomplish this goal. Over the past decade, there has been a steady decline in live births from 40 500 to an estimated 33 800 in 2020, reflecting a 16.5 per cent decline in births. The Crude Birth Rate (CBR) was 12.3 per 1 000 population in 2020 (see Table 20.1).

Women in the reproductive age group (15–49 years) accounted for 759 100 in 2020, 54.8 per cent of the female population. The General Fertility Rate (GFR) of 44.5 births per 1 000 women reflected a decrease of 1.5 percentage points compared with the corresponding year (Figure 20B and Table 20.3A). The overall reduction in births is

11. The demographic dividend can be defined as the economic growth potential that can be derived, owing to changes in a population’s age structure, chiefly when the share of the working-age population (15–64) is larger than the non-working-age (under 15, and 65 and older) share of the population. See Population Reference Bureau, *Glossary of Demographic Terms* (2019).
 12. Vision 2030 Jamaica – National Development Plan: is the ‘roadmap’ for making “Jamaica, the Place of Choice to live, work, raise families and do business”.

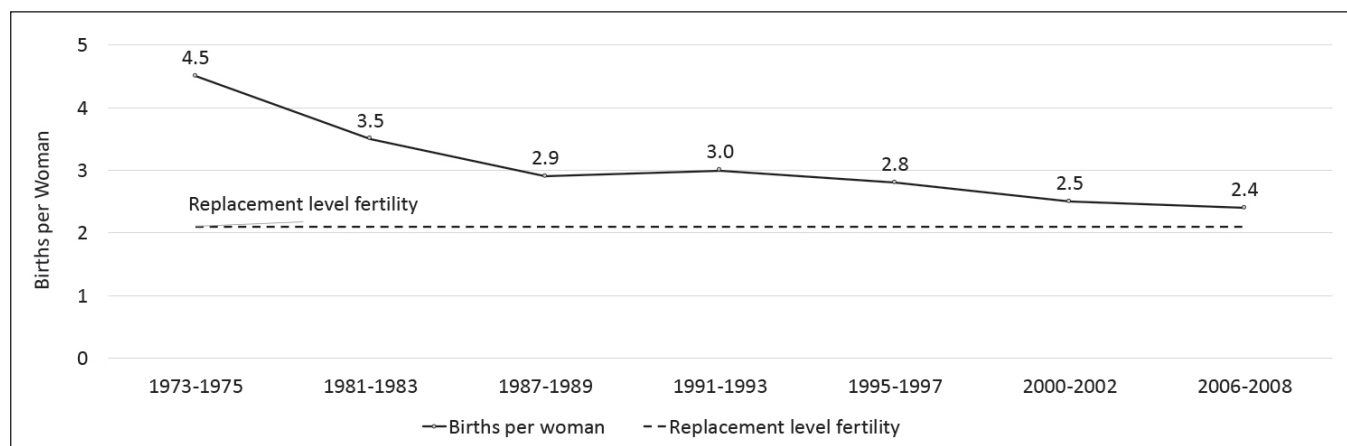


FIGURE 20B: TOTAL FERTILITY RATES IN JAMAICA, 1973–2008

indicative of increased contraceptive prevalence; increased educational attainment of women; and the high labour force participation of women.

The Reproductive Health Survey (RHS) captures data on Age Specific Fertility Rate (ASFR) in Jamaica. The latest RHS (2008) estimated that ASFR declined to 72 births per 1 000 women 15–19 years in 2008 from 79 births in 2002 and 112 births in 1997. Although the rates have been declining, they are relatively high when compared with other countries in the Caribbean sub-region, and the Latin America and Caribbean region in general.

Family Planning Initiatives

In an effort to target adolescent health issues, and reduce the prevalence of teenage pregnancies, the **Ministry of Health and Wellness (MOHW)** continued to plan, design and implement programmes geared towards promoting friendly services for adolescents. Standards and Criteria have been developed to facilitate this process. Diverse categories of health-care workers receive continuous training to address the needs of adolescents. The 10th Annual National Adolescent Health Workshop was held in December 2020, over two days. A total of 203 health-care workers (public and private) participated in the workshop, with Continuing Medical Examination (CME) credits to be awarded to participants.

The objectives of the workshop were to:

- enhance the communication skills of health-care providers
- review common medical, emotional and behavioural concerns that affect adolescents
- increase awareness of and competence in screening for adolescent health concerns
- explore varied approaches to management of adolescents by health-care workers.

As Jamaica joined the rest of the world in addressing the spread of COVID-19, the MOHW focused on a number

of services in order to meet the needs of adolescents and young people in isolation or quarantine facilities. To protect the health of these individuals and prevent further spread of the virus, two parallel programmes were developed to engage the young persons. Both programmes were delivered virtually, and the use of social media was identified as a meaningful way to interact with young people islandwide. The phases of the programme were as follows:

- Phase 1 entailed a Customer Service Training course delivered to individuals from the Business Process Outsourcing (BPO) workplace clusters affected by COVID-19, which was delivered by HEART/NSTA Trust.
- Phase 2 focused on presentations discussing healthy lifestyle, using social media. Scheduling of activities was done over a three-week period.

The topics were Sexual and Reproductive Health (SRH); Stigma and Discrimination; COVID-19 Preparedness and Life after COVID-19; Mental Health and Wellness; Financial Education; Family Planning; Career and Job Readiness; and Substance Abuse. Through support from the United Nations Population Fund (UNFPA), the MOHW commenced a baseline assessment of selected risk factors of pregnancy among high school students in Eastern Jamaica. A literature review was completed and findings from the study will assist in the planning and implementation of interventions to address problems identified.

A number of initiatives were undertaken by the **National Family Planning Board (NFPB)** to improve access to family planning and other reproductive health services in Jamaica. The NFPB supplied the health departments across the island with a total of 856 103 units of contraceptives in 2020 compared with 3 803 506 in the previous year, representing a 77.5 per cent decline over the period. Despite the reduced distribution of male condoms

TABLE 20.3a
DISTRIBUTION OF WOMEN IN THE REPRODUCTIVE
AGES (15–49) ESTIMATES, 2016–2020

AGE GROUP	2016	2017	2018	2019 ^P	2020	2016	2017	2018	2019	2020 ^P
15-19	122 300	118 800	115 700	112 000	112 200	16.1	15.7	15.3	14.8	14.8
20-24	131 900	132 300	129 300	125 100	125 300	17.4	17.4	17.1	16.5	16.5
25-29	120 400	120 900	122 700	124 400	124 600	15.9	15.9	16.2	16.4	16.4
30-34	111 800	111 200	111 700	114 300	114 500	14.8	14.8	14.7	15.1	15.1
35-39	94 900	98 800	102 600	105 300	105 500	12.5	13.0	13.5	13.9	13.9
40-44	91 600	89 700	89 200	89 100	89 200	12.1	11.8	11.8	11.8	11.8
45-49	84 500	86 700	87 000	87 700	87 800	11.2	11.4	11.5	11.6	11.6
TOTAL	757 400	758 400	758 200	757 900	759 100	100.0	100.0	100.0	100.0	100.0
GFR	47.8	45.4	43.7	46.0	44.5					

NOTE:

p – preliminary

Discrepancies due to rounding

Source: Statistical Institute of Jamaica (STATIN), Registrar General's Department (RGD) and internal PIOJ calculations

(678 632) and injectables (126 172) compared with 3 565 196 and 180 700, respectively, for 2019, these were among the largest units of contraceptives that were distributed (Table 20.3b). Implant and Intra-uterine Contraceptive Device/Copper-T (IUCD) increased by approximately 10.0 per cent and 82.0 per cent, respectively.

Data from the NFPB revealed that 104 231 family planning visits were made to public health facilities in 2020 compared with 191 532 in the previous year, recording a decrease of 45.6 per cent (Table 20.3c). Of the number of visitors for family planning services, 96.1 per cent was female. Between 2019 and 2020, female visits decreased by 49.9 per cent and male visits declined by 74.5 per cent. This decline in visits, between the two periods, for both males and females may be attributed to COVID-19, and the subsequent confinement measures implemented by the

government. In addition, the data for 2020 are provisional. Furthermore, the capacities of civil society organizations (CSOs) were strengthened to provide services and supplies to persons at the community level due to the lockdown. Overall, St Catherine accounted for the largest proportion (20.5 per cent) of visits, followed by Kingston and St Andrew (19.3 per cent) and St Ann (9.0 per cent).

A total of 18 079 persons were new acceptors of modern contraceptive methods in 2020, down from 42 754 in the previous year, a decline of 57.7 per cent. As is customary, the majority of new family planning acceptors (95.0 per cent) utilized short-term contraceptive methods (pill, injection and condom). The injection remained the most commonly used contraceptive among new acceptors (49.4 per cent), but recorded a 65.6 per cent decline relative to the previous period. The condom was the second most

TABLE 20.3b
DISTRIBUTION OF COMMODITIES BY TYPE, 2016–2020

Commodity	2016	2017	2018	2019	2020 ^P	2016	2017	2018	2019	2020 ^P
Oral Contraceptive Pill	67 580	60 420	42 940	54 861	47 619	3.7	2.6	2.4	1.3	5.6
Male Condom	2 126 800	2 075 976	1 547 976	3 565 196	678 632	86.5	88.7	87.0	94.1	79.3
Intrauterine Device (IUD)	1 828	1 650	1 580	911	1 659	0.1	0.1	0.1	0.0	0.2
Implant	460	330	1 430	1 838	2 021	0.0	0.0	0.1	0.0	0.2
Injectables	177 100	201 734	184 556	180 700	126 172	9.7	8.6	10.4	4.6	14.7
Total	2 373 768	2 340 110	1 778 482	3 803 506	856 103	100	100	100	100	100

p – provisional

Source: NFPB Inventory Management Records, 2020

TABLE 20.3c
UTILIZATION AND COVERAGE OF PUBLIC SECTOR FAMILY PLANNING SERVICES, 2016–2020

INDICATOR	2016	2017	2018	2019 ^r	2020 ^p
Estimated ^a population for family planning	576 545	581 952	575 816	522 943	-
Attendance at family planning clinics	243 399	210 223	202 983	191 532	104 231
Number of family planning users (per annum)	57 393	50 013	56 292	55 056	30 573
Number of new acceptors	41 942	38 402	39 759	42 754	18 079
Number of new acceptors as a % of total users	73.1	76.8	70.6	77.7	59.1
New acceptors < 20 yrs. of age as a % of new acceptors	15.0	13.0	13.8	12.4	11.2
New acceptors as a percentage of target population	7.3	6.6	6.9	8.2	-
Male attendance as a % of total attendance	6.8	5.8	5.3	5.0	3.9
Percentage distribution of new acceptors by method					
Pill	13.0	12.7	12.6	11.0	15.3
Injection (DMPA)	63.6	60.1	60.0	62.0	49.4
Male Condom	20.5	24.0	24.0	24.0	30.3
Jadelle/Norplant & IUD	2.9	3.2	3.7	3.6	5.0
TOTAL	100.0	100.0	100.0	100.0	100.0
Number of sterilizations (female)	1 584	1 926	1 504	-	-

NOTE:

a – Target population = 69.0 per cent of the women in the reproductive age group 15–49 years (2006–2008), 72.5 per cent from 2009 to 2014, 76.0 per cent from 2014 through to 2019

p – provisional

– Figures exclude sterilization operations performed, Emergency Contraceptive Pill and Diaphragm (Sterilization noted below total, and not included in total tally).

– Target population = 72.5 per cent of women in the reproductive age group 15–49 years and 76.0 from 2014 to present.

– Jadelle replaced Norplant in 2010

Source: National Family Planning Board (NFPB)

popular method used (30.3 per cent) in 2020. A decline (47.3 per cent) in uptake of this method was also recorded over the period. New acceptors of long-term contraceptives (Intrauterine Contraceptive Device – IUCD or Implant) accounted for approximately 5.0 per cent. The IUCD usage declined by 26.2 per cent from 946 in 2019 to 698 in 2020. Implant acceptors accounted for 1.1 per cent of users and recorded a decrease from 563 in 2019 to 207 in 2020 (see Table 20.3b).

The use of a second contraceptive method, in addition to a primary contraceptive, is referred to as dual method use (DMU). In an effort to prevent the human immunodeficiency virus (HIV), other sexually transmitted infections (STIs), unwanted, and unintended pregnancies, the condom was introduced for dual method use. The number of clients who utilized condoms, along with their primary method, reduced by 38.6 per cent, from 20 015 in 2019 to 12 294 in 2020.

The RHS, slated to be conducted over the period December 2020–April 2022, is to be implemented in six phases at an approximate cost of \$64.5 million. The exercise will be spearheaded by the NFPB, in partnership with the Statistical Institute of Jamaica (STATIN). Over the reporting period, the survey instrument was finalized and approved by the MOHW's Ethics Committee.

Subsequently, the instrument was submitted to STATIN for data collection. The objectives of the RHS are, to:

- capture information relating to men and women aged 15 to 49 years
- produce sound evidenced-based sexual and reproductive health data that will accurately
- update the country on the status of total fertility, contraceptive use, knowledge, attitude and practice, reproductive health, maternal and childcare, infant and child mortality, HIV/AIDS and other sexually transmitted infections, and Gender-Based Violence (GBV)
- provide reliable measurement of fertility
- provide information that will inform the implementation and monitoring of existing national policies, programmes, plans and projects on SRH, and simultaneously create avenues for more robust strategic endeavours.

The **Jamaica Family Planning Association (JFPA)** continued to support the government's effort to achieve the SRH targets established in the Vision 2030 Jamaica – National Development Plan. The entity provided support through the delivery of clinical SRH and reproductive rights services; research; education; and advocacy.

Adult health and adolescent SRH services were provided to the public through the organization's two main clinics—the Lenworth Beth Jacobs Clinic in Kingston and the Beth Jacobs Clinic located in St Ann. Family Planning services were also provided to the public through pop-up clinics, health fairs and the 10 associated clinic outlets. Delivery of services is guided by MOHW's protocols.

The JFPA served as a key distribution outlet for male condoms, from its inventory as well as from stocks donated by the AIDS HealthCare Foundation. Condom distribution is a key component of the Community-based Distribution initiative in St Ann, St Catherine and Kingston. Community education and outreach for the period was limited, owing to COVID-19, as the Association was forced to abandon traditional ways (face-to-face) of engaging target communities and adjust to new norms. Methods of interacting with clients now include communicating via telephone and engaging on social media and other online platforms. Members of the Youth Advocacy Movement (YAM) of the JFPA received training on how to effectively utilize social media and other online platforms to engage clients.

Over the reporting period, the JFPA provided support to the MOHW through the provision of SRH services to adolescents who accessed the Teen Hub in Half Way Tree. Additionally, the Association participated in the MOHW's virtual health fair in September, where the entity facilitated educational sessions, distributed condoms and participated in a radio discussion on adolescent health issues.

During the year, the JFPA conducted two studies: a retrospective study using secondary data to ascertain (i) contraceptive experience of women who removed their sub-dermal implants; and (ii) a study to explore the health seeking behaviour of pregnant women during COVID-19.

MORTALITY

Data from the RGD, estimated deaths at 18 100, resulting in a crude death rate (CDR) of 6.6 per 1 000 population compared with 7.0 per 1 000 population in 2019. The CDR is defined as the number of deaths in a year per 1 000 mid-year population.¹³ Of note, deaths caused by COVID-19, a communicable disease, numbered 303 (1.7 per cent of total deaths), and contributed to the CDR in 2020.

Chronic diseases continue to be a major public health burden in the country. Non-Communicable Diseases (NCDs), such as cardiovascular disease, cancers and

diabetes are among the leading causes of death in Jamaica. The three main causes of death for women in 2020 were diabetes mellitus, cerebrovascular diseases and hypertensive diseases. However, for males it was mainly illnesses associated with external causes,¹⁴ cerebrovascular diseases and diabetes mellitus.

The MOHW is committed to lead the formulation of health policies, planning and the evaluation of health programmes; this has resulted in improvements in life expectancy and the steady decline in infant and under-five mortality. Life expectancy remains unchanged, with the average life expectancy at birth estimated at 74.2 years (70.4 for males and 78.0 for females).¹⁵

SPATIAL DISTRIBUTION

The 2011 Population and Housing Census indicates that 54.0 per cent of the population lives in urban areas. According to the Statistical Institute of Jamaica (STATIN), “any high density settlement with a population concentration of 2 000 or more persons and which possess a number of amenities and utilities which indicate modern living is considered urban.”¹⁶ Urbanization occurs due to push and pull factors, mainly due to people wanting to improve their well-being and quality of life. However, rural to urban migration has positive and negative effects on both the parishes of origin and destination. As Jamaica's urban population increases, social, economic and environmental factors are likely to affect population density, distribution and structure. In response, adequate infrastructure, human capital development, job creation and environmental management must become paramount in policy and planning to facilitate sustainable development.

Estimates revealed that the largest proportion of the population continued to be concentrated in Kingston and St Andrew (24.2 per cent), followed by St Catherine (19.0 per cent). Hanover recorded the smallest proportion of residents, accounting for 2.7 per cent (Table 20.4).

INTERNATIONAL MIGRATION

International migration is an important determinant of population change. Over the past two decades, the number of international migrants has grown considerably. “Globally, the closing of national borders and disruptions to international travel resulted in persons cancelling or delaying migration. A number of migrants were stranded,

13. Ibid., 269.

14. Death by external causes include sudden and violent deaths reported by the police but not yet registered by the Registrar General's Department.

15. Statistical Institute of Jamaica, *Population and Housing Census, 2011: Jamaica, General Report Volume 1* (Kingston: STATIN, 2013), iv.


16. Ibid., 18.

TABLE 20.4
END-OF-YEAR POPULATION OF JAMAICA BY PARISH, 2015–2019

	End of Year Population 2015	End of Year Population 2016	End of Year Population 2017	End of Year Population 2018	End of Year Population 2019	% Distribution 2019
JAMAICA	2 719 500	2 721 700	2 726 900	2 726 700	2 734 100	100.0
Kingston & St. Andrew	662 800	662 300	662 300	662 600	662 500	24.2
St. Thomas	94 200	94 100	94 300	94 400	94 400	3.5
Portland	81 300	81 200	81 100	81 000	80 900	3.0
St. Mary	114 400	114 500	114 700	114 900	115 100	4.2
St. Ann	174 700	175 200	175 900	176 500	177 100	6.5
Trelawny	77 000	77 400	77 700	78 100	78 500	2.9
St. James	188 200	189 000	189 900	190 900	191 800	7.0
Hanover	71 200	71 400	71 800	72 200	72 500	2.7
Westmoreland	147 600	148 200	148 800	149 400	149 900	5.5
St. Elizabeth	151 300	151 400	151 700	151 900	151 900	5.6
Manchester	191 200	191 200	191 400	191 600	191 700	7.0
Clarendon	246 800	246 800	256 900	247 200	247 100	9.0
St. Catherine	518 800	519 000	519 500	520 200	520 800	19.0

Source: Statistical Institute of Jamaica (STATIN)

unable to return to their countries, while others were forced to return to their home countries earlier than planned.”¹⁷

Jamaican Emigrants who were granted Permanent Status, 2019		
		
USA	CANADA	UK
21 689	3 980	2 342

There is a one-year lag for most migration data, in particular, data from the three main destination countries to which Jamaicans have migrated (United States of

America – USA, Canada, and the United Kingdom –UK). Due to this, the analyses will cover the period 2015–2019.

International migration is defined as the movement across an international border for the purpose of establishing a new permanent residence.¹⁸ International migration is classified as both immigration¹⁹ and emigration.²⁰ In the context of Jamaica, an individual who is an immigrant must be a resident in Jamaica for six months or more.²¹ Jamaica, due to the nature and diversity of migration flows, has been classified as a country of origin, transit and destination.²² Monitoring mechanisms and legislative frameworks for international migration include the Immigration Restriction (Commonwealth Citizens) Act, 1945 and the National Policy on International Migration and Development (IMD), 2017. The Policy “seeks to ensure that international migration is adequately measured, monitored and influenced to serve the development needs of the country as outlined in the Vision 2030 Jamaica – National Development Plan”.²³

17. United Nations Department of Economic and Social Affairs, *World Population Prospects* (UNDESA: 2020), 1.

18. Jacob Siegel and David A. Swanson, *The Methods and Materials of Demography, Second Edition* (San Diego: Elsevier Academic Press, 2004).

19. Ibid. Immigration is the process by which non-nationals move into a country for the purpose of settlement.

20. Emigration is defined as the act of departing or exiting from one country or state to settle in another. See International Organization for Migration, *Migration in Jamaica: A Country Profile* (Kingston: IOM, 2018).

21. Ibid.

22. Ibid.

23. Planning Institute of Jamaica, National Policy on International Migration and Development (Kingston: PIOJ, 2017), vii.

Emigration²⁴

Data for 2019 indicate that 28 011 emigrants from Jamaica were granted visas for permanent residence in the USA and Canada, and British citizenship in the UK, representing a 0.8 per cent increase compared with the previous year (Table 20.5a). The USA continues to be the destination of choice for Jamaican emigrants. A total of 21 689 emigrants were granted permanent residence in the USA, an increase of 6.6 per cent in comparison to the previous year. The figure represents visas issued to Jamaicans in Jamaica, those already living in the USA, and those living elsewhere (see Table 20.5a). An

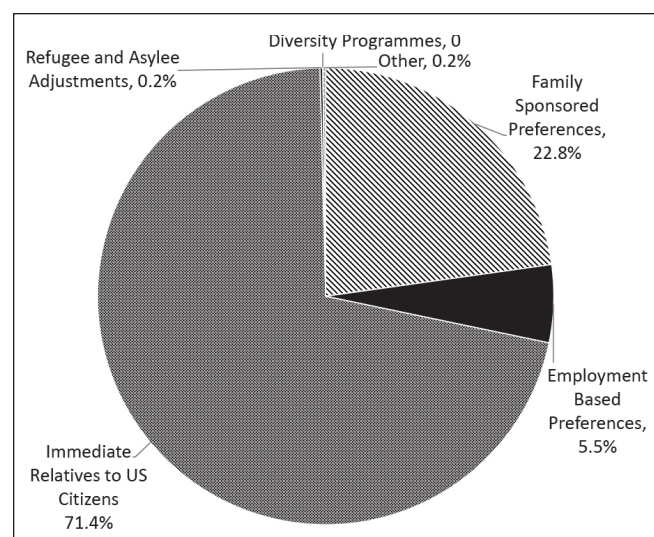


FIGURE 20C: CATEGORIES OF ADMISSION

TABLE 20.5a
MAIN DESTINATIONS OF MIGRATION FROM JAMAICA,
2009–2019

YEAR	COUNTRY			TOTAL
	USA	CANADA ^a	UK	
2009	21 783	2 455	3 148	27 386
2010	19 825	2 310	2 958	25 093
2011	19 662	2 055	2 515	24 232
2012	20 705	2 185	3 007	25 897
2013	19 400	2 470	2 874	24 744
2014	19 026	3 055	2 372	24 453
2015	17 642	3 415	1 778	22 835
2016	23 350	3 560	2 313	29 223
2017 ^r	21 905	3 830	1 651	27 386
2018 ^p	20 347	3 875	3 561	27 783
2019 ^p	21 689	3 980	2 342	28 011

NOTES:

a – Period of reference is January to December 2009–2019.

r – revised

p – provisional

Source: Compiled from data provided by:
Yearbook of Immigration Statistics, March 2020;
Office of Immigration Statistics, US Department of Homeland Security;
Citizenship and Immigration Canada, March 2020;
Home Office, Immigration Statistics, March 2020.

examination of the data based on categories of admission revealed that “Immediate Relatives to US” and “Family Sponsored Preferences” remained the primary categories of admission (71.4 per cent and 22.8 per cent, respectively). This was followed by “Employment-Based Preferences” (5.5 per cent) {see Table 20.5b and Figure 20C}. There was no data

TABLE 20.5b
JAMAICAN IMMIGRANTS ADMITTED TO THE UNITED STATES OF AMERICA
BY SELECTED CLASS OF ADMISSION, 2015–2019

	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Family Sponsored Preferences	5 440	5 831	6 150	5 667	4 942	30.8	25.0	28.1	27.9	22.8
Employment Based Preferences	622	823	957	1 047	1 184	3.5	3.5	4.4	5.1	5.5
Immediate Relatives to US Citizens	11 437	16 587	14 694	13 542	15 484	64.8	71.0	67.1	66.6	71.4
Refugee and Asylee Adjustments	63	d	d	43	d	0.4	-	-	0.2	0.2
Diversity Programmes	0	d	d	3	d	0	-	-	0	-
Other	80	55	54	45	47	0.5	0.2	0.2	0.2	0.2
Total	17 642	23 350	21 905	20 347	21 689	100.0	100.0	100.0	100.0	100.0

NOTE:

d – Disclosure standards not met

Source: Yearbook of Immigration Statistics, 2015, 2016, 2017, 2018, 2019

24. There is a one-year lag in most migration data.

on age, sex and occupational status for Jamaican migrants to the USA at the time of publication.

Canada granted permanent resident status to 3 980 migrants from Jamaica in 2019, representing a 2.7 per cent increase relative to 2018. Over the past five years, the largest proportion of Jamaicans granted permanent resident status was between 25 and 44 years. Many of these individuals are females in their prime productive and reproductive years,²⁵ a trend highlighted in the 2017 IMD Policy and Plan of Action.

TABLE 20.5c
PERMANENT RESIDENTS ADMITTED FROM
JAMAICA TO CANADA BY AGE, 2015–2019

AGE GROUP	2015	2016	2017	2018	2019 ^P
0-4	105	95	100	95	80
5-9	270	315	310	305	320
10-14	305	370	405	380	390
15-19	325	380	400	360	375
20-24	300	200	175	245	330
25-29	370	415	450	447	435
30-34	500	585	600	646	550
35-39	400	410	500	536	495
40-44	290	320	375	335	340
45-49	200	210	205	251	300
50-54	135	95	125	125	155
55-59	70	65	65	80	80
60-64	45	40	55	35	55
65+	95	60	60	35	75
TOTAL	3 410	3 560	3 830	3 875	3 980
0-4	3.1	2.7	2.6	2.5	2.0
5-9	7.9	8.8	8.1	7.9	8.0
10-14	8.9	10.4	10.6	9.8	9.8
15-19	9.5	10.7	10.4	9.3	9.4
20-24	8.8	5.6	4.6	6.3	8.3
25-29	10.9	11.7	11.7	11.5	10.9
30-34	14.7	16.4	15.7	16.7	13.8
35-39	11.7	11.5	13.1	13.8	12.4
40-44	8.5	9.0	9.8	8.6	8.5
45-49	5.9	5.9	5.4	6.5	7.5
50-54	4.0	2.7	3.3	3.2	3.9
55-59	2.1	1.8	1.7	2.1	2.0
60-64	1.3	1.1	1.4	0.9	1.4
65+	2.8	1.7	1.6	0.9	1.9
TOTAL	100.0	100.0	100.0	100.0	100.0

NOTES:

r – revised

p – provisional

Discrepancies due to rounding

Source: Citizenship and Immigration, Canada, March 31, 2020

In 2019, there was a decrease in the number of permanent resident visas granted, ranging from approximately 15.0 per cent to 2.0 per cent when compared with 2018. Over the review period, 550 emigrants in the 30–34 age group were granted permanent resident status, accounting for a decrease of 14.7 per cent in emigrants to Canada compared with the previous year. Emigrants in the 35–39 age group, the second largest group of emigrants to Canada accounted for 495 in 2019, a decrease of 7.5 per cent compared with the previous year. Jamaicans, 25–29 years, who were granted permanent resident status numbered 435, a decrease of 2.3 per cent relative to 2018 (Table 20.5c).

The Statistical Institute of Jamaica’s Standard Occupational Classification, Report 2015, is used to classify data from Citizenship and Immigration Canada on emigrants from Jamaica into occupational categories. This resulted in seven occupation groups. In 2019, the largest proportion of permanent emigrants was categorized as “Non-workers, New Workers, Homemakers, Students and Retirees” (83.8 per cent), followed by “Professionals, Senior Officials and Technicians” (6.3 per cent). This trend remained relatively constant over the past five years. An increase of 2.1 percentage point was observed for “Non-workers, New Workers, Homemakers, Students and Retirees” relative to a 4.2 percentage point decrease between 2017 and 2018. In the category “Professionals, Senior Officials and Technicians” (250), there was a decrease of 15.2 per cent in the number of permanent emigrants from Jamaica compared with the previous year (Table 20.5d). With regard to data on temporary workers, “Elementary Occupations” accounted for the majority from Jamaica to Canada (82.6 per cent), followed by “Other”, with 10.9 per cent (Table 20.5e).

Since 2019, British citizenship has been reclassified and granted to applicants under one of four new categories: Naturalization based on Marriage; Naturalization based on Residence; Registration of Minor Children; and Registration based on other grounds.²⁶ The number of Jamaicans who were granted citizenship from 2015 to 2019 fluctuated (Table 20.5f). Over the period of review, 2 342 Jamaicans were granted Citizenship, a decrease of 34.2 per cent compared with 2018. The category “Naturalization based on Residence” (65.2 per cent) continued to record the largest proportion of British citizenship approved, followed by the category “Naturalization based on Marriage” (13.0 per cent) and “Registration of Minor Children” (11.8 per cent) {see Table 20.5f}.

25. PIOJ, National Policy and Plan of Action on International Migration and Development (Kingston: PIOJ, 2017), 7.

26. Home Office Immigration Statistics User Guide, UK Home Office (March 18, 2021).

TABLE 20.5d
PERMANENT RESIDENTS FROM JAMAICA TO CANADA
BY OCCUPATION, 2015–2019

OCCUPATION GROUP	2015	2016	2017	2018	2019 ^P
Professionals, Senior Officials and Technicians	265	120	195	295	250
Clerks	0	0	0	0	0
Service Workers and Shop and Market Sales Workers	75	90	70	60	65
Skilled Agricultural and Fishery Workers	0	0	0	0	0
Craft and Related Trades Workers	85	75	25	15	10
Plant and Machine Operators and Assemblers	25	25	55	110	65
Elementary Occupations	0	0	0	0	0
Non-workers, New Workers, Homemakers, Students and Retirees	2 925	3 035	3 290	3 165	3 335
Unknown	40	240	195	230	255
TOTAL	3 415	3 560	3 830	3 875	3 980
Professionals, Senior Officials and Technicians	7.8	3.4	5.1	7.6	6.3
Clerks	0.0	0.0	0.0	0.0	0.0
Service Workers and Shop and Market Sales Workers	2.2	2.5	1.8	1.5	1.6
Skilled Agricultural and Fishery Workers	0.0	0.0	0.0	0.0	0.0
Craft and Related Trades Workers	2.5	2.1	0.7	0.4	0.3
Plant and Machine Operators and Assemblers	0.7	0.7	1.4	2.8	1.6
Elementary Occupations	0.0	0.0	0.0	0.0	0.0
Non-workers, New Workers, Homemakers, Students and Retirees	85.6	85.3	85.9	81.7	83.8
Unknown	1.2	6.7	5.1	5.9	6.4
TOTAL	100.0	100.0	100.0	100.0	100.0

NOTES:

r – revised

p – provisional

Due to privacy considerations, the figures in this table have been subjected to random rounding. Under this method, all figures are randomly rounded either up or down to multiples of *5*.

The data obtained from Citizenship and Immigration, Canada were classified according to the Jamaica Standard Occupational Classification, STATIN.

Occupation classification was done at the broad level of data submitted by Canada.

Source: IRCC, Permanent Residents, March 31, 2019 Data

Immigration²⁷

Immigration can have an impact on both the country of origin and the country of destination. Immigrants

TABLE 20.5e
TEMPORARY WORKERS FROM JAMAICA TO CANADA
BY OCCUPATION, 2015–2019

OCCUPATION GROUP	2015 ^r	2016 ^r	2017 ^r	2018 ^r	2019 ^P
Professionals, Senior Officials and Technicians	160	105	95	85	120
Clerks	0	0	0	0	0
Service Workers and Shop and Market Sales Workers	215	255	175	200	210
Skilled Agricultural and Fishery Workers	5	5	15	10	15
Craft and Related Trades Workers	295	260	265	230	210
Plant and Machine Operators and Assemblers	195	170	135	140	90
Elementary Occupations	7 980	8 875	8 915	9 695	9 765
Other	605	1 020	1 050	1 130	1 285
Unknown	5	100	100	95	125
TOTAL	9 460	10 780	10 750	11 585	11 820
Professionals, Senior Officials and Technicians	1.7	1.0	0.9	0.7	1.0
Clerks	0.0	0.0	0.0	0.0	0.0
Service Workers and Shop and Market Sales Workers	2.3	2.4	1.6	1.7	1.8
Skilled Agricultural and Fishery Workers	0.1	0.0	0.1	0.1	0.1
Craft and Related Trades Workers	3.1	2.4	2.5	2.0	1.8
Plant and Machine Operators and Assemblers	2.1	1.6	1.3	1.2	0.8
Elementary Occupations	84.4	82.3	82.9	83.7	82.6
Other	6.4	9.5	9.8	9.8	10.9
Unknown	0.1	0.9	0.9	0.8	1.0
TOTAL	100.0	100.0	100.0	100.0	100.0

NOTES:

r – revised

p – provisional

The figures in this table have been subject to random rounding; rounded either up or down to multiples of *5*.

The data obtained from Citizenship and Immigration, Canada were classified at the broad occupation group according to the Jamaica Standard Occupational Classification, STATIN.

Source: IRCC, Temporary Residents, March 31, 2019 Data

in Jamaica are classified as follows: Voluntary Returned Residents; Involuntary Returned Migrants; Commonwealth Citizens; Refugees; and Aliens.

Voluntary Returned Residents

The total number of voluntary returned residents to Jamaica in 2020 was 731, an increase of 1.4 per cent relative

27. Immigration data does not have the one-year lag seen in emigration data.

TABLE 20.5f
JAMAICANS RECEIVING BRITISH CITIZENSHIP BY TYPE, 2015–2019

YEAR	NATURALISATION BASED ON MARRIAGE	NATURALISATION BASED ON RESIDENCE	REGISTRATION OF MINOR CHILDREN	REGISTRATION ON OTHER GROUNDS	TOTAL
2015	325	784	356	313	1 778
2016	346	955	464	548	2 313
2017 ^r	249	737	334	331	1 651
2018 ^r	358	2 484	389	330	3 561
2019 ^p	304	1 528	277	233	2 342
PERCENTAGE					
2015	18.3	44.1	20.0	17.6	100.0
2016	15.0	41.3	20.1	23.6	100.0
2017	15.1	44.6	20.2	20.0	100.0
2018	10.0	69.8	10.9	9.3	100.0
2019	13.0	65.2	11.8	10.0	100.0

r – revised

Source: Control of Immigration Statistics: United Kingdom, March 2021. Home Office Statistical Bulletin, Home Office

to the previous year. However, examination of the data over the five-year period 2016–2020 indicates a decrease of 4.6 per cent—766 in 2016 to 731 in 2020 (Table 20.5g). The USA accounted for the largest proportion (52.0 per cent) of returning residents, followed by those from “Other” countries (21.1 per cent), and the UK (15.7 per cent). As usual, Canada accounted for the lowest proportion.

Involuntary Returned Migrants

Estimates revealed a continuous downward trend in the number of involuntary returned migrants (IRMs) to

Jamaica, from 1 757 in 2016 to 653 in 2020, a reduction of 62.8 per cent. The data also indicate a decline of approximately 38.0 per cent in the number of IRMs relative to the previous year. This was the largest decrease recorded for a single year between 2016 and 2020 (see Table 20.5g). This reduction may have resulted from delays experienced in processing prospective IRMs, due to the pandemic. The majority of IRMs (471) was returned from the USA, accounting for 72.1 per cent, followed by “Other” countries, 17.2 per cent (see Table 20.5g). Males (601) continued to represent the largest percentage, 92.0 per cent of IRMs to

TABLE 20.5g
JAMAICAN RETURNED RESIDENTS AND INVOLUNTARY RETURNED MIGRANTS, 2016–2020

YEAR	RETURNED RESIDENTS					INVOLUNTARY RETURNED MIGRANTS				
	USA	CANADA	UK	OTHER	TOTAL	USA	CANADA	UK	OTHER	TOTAL
2016	346	123	164	133	766	666	146	278	667	1 757
2017	106	162	470	134	872	649	110	147	487	1 393
2018 ^r	384	75	147	125	731	742	75	72	294	1 183
2019 ^p	400	86	102	133	721	615	104	48	284	1 051
2020	380	82	115	154	731	471	33	37	112	653

NOTE:

r – revised

p – provisional

In the case of family units of returning residents, only one adult member is required to register on behalf of the family.

In several instances, registered returnees are accompanied by family members or relatives.

Source: Jamaica Constabulary Force – Police Statistics Department, Jamaica Customs Department

TABLE 20.5h
IMMIGRATION TO JAMAICA, 2016–2020

YEAR	VOLUNTARY RETURNED RESIDENTS	INVOLUNTARY RETURNED MIGRANTS	COMMONWEALTH CITIZENS	ALIENS	TOTAL
2016	766	1 757	3 474	7 639	11 113
2017	872	1 393	3 930	9 709	15 904
2018	731	1 183	4 187	9 993	16 094
2019	721	1 051	4 255	10 595	16 622
2020 ^P	731	653	3 428	11 081	15 952

NOTES:

p – provisional

Aliens are Non-Commonwealth Citizens.

The figures for Commonwealth Citizens are for persons granted extension of stay.

Diplomats are not included in this group.

These include work permits, marriage exemption certificates and student status.

Source: Passport, Immigration and Citizenship Agency (PICA), Ministry of National Security;
Jamaica Customs Department;
Jamaica Constabulary Force, Police Statistics Department.

TABLE 20.5i
DISTRIBUTION OF ALIENS WHO REQUESTED EXTENSION OF STAY BEYOND SIX MONTHS, 2016–2020

	NUMBER					PER CENT				
	2016	2017	2018	2019 ^r	2020 ^P	2016	2017	2018 ^r	2019 ^r	2020 ^P
Asians	3 526	4 521	5 884	6 384	4 975	46.2	46.6	48.5	46.8	44.9
Caribbean	1 091	1 397	2 352	2 653	1 963	14.3	14.4	19.4	19.4	17.7
Africans	46	61	534	653	555	0.6	0.6	4.4	4.8	5.0
Oceania	3	5	68	68	52	0	0.1	0.6	0.5	0.5
Europeans	1 177	1 498	1 001	1 285	1 146	15.4	15.4	8.3	9.4	10.3
USA	790	1 039	1 157	1 057	1 086	10.3	10.7	9.5	7.7	9.8
Latin Americans	1 006	1 188	1 127	1 548	1 304	13.2	12.2	9.3	11.3	11.8
TOTAL	7 639	9 709	12 123	13 648	11 081	100	100.0	100.0	100.0	100.0

r – revised

p – provisional

Source: Passport Immigration and Citizenship Agency (PICA)

Jamaica, compared with females (52). Males were mainly found in the 31–35 age group, while the majority of female IRMs was between 21 and 45 years. The main reasons for deportation were: Overstay/Illegal Entry/Re-Entry (30.0 per cent) and Possession of Drugs (28.8 per cent) {see chapter on National Security and Justice}.

Commonwealth Citizens and Aliens²⁸

A total of 3 428 Commonwealth Citizens residing

in Jamaica were granted extensions beyond six months, reflecting a decrease of 19.4 per cent compared with 4 255 in 2019. Conversely, there was a 4.5 per cent increase in the number of Aliens who were granted extension of stay. A total of 11 081 Aliens were granted an extension compared with 10 595 in 2019 (Table 20.5h). The majority of Aliens who requested extension of stay beyond six months in 2020 was of Asian descent (44.9 per cent), followed by Caribbean nationals (17.7 per cent), and Latin Americans (11.8 per

28. An Alien is referred to as a person in a given country who is a citizen of another country or otherwise owes allegiance to another country. See Jacob Siegel and David A. Swanson, *The Methods and Materials of Demography, Second Edition* (San Diego: Elsevier Academic Press, 2004) 752.

cent) {Table 20.5i}.

Caribbean Single Market and Economy (CSME) Certificates²⁹

In 2002, the Treaty of Chaguaramas was revised to establish the CARICOM Single Market and Economy (CSME) and remove barriers to trade. The CSME enables the free movement of services, capital, goods, technology and people across CARICOM member states. Under the CSME, skilled professionals do not require a work permit to engage in employment within CARICOM States. The categories of skilled workers to which this concession applies include university graduates, media workers, journalists, medical persons, sports persons, musicians, artists, managers, supervisors and other service providers. The categories of skills are expanded periodically. In Jamaica, the Caribbean Community (Free Movement of Skilled Persons) Act (1997) facilitates the implementation of the CSME. The Act requires that a “Certificate of Recognition of Caribbean Community Skilled Person” be issued to CARICOM nationals who fall in any of the listed categories. Over the five-year period 2016–2020, a total of 845 Jamaican citizens received CSME certificates from the Ministry of Labour and Social Security (MLSS). In 2020, a total of 103 Jamaicans received CSME certificates from the ministry, representing a reduction of 38.7 per cent, from 168 in the previous year. Regarding the receipt of a CSME certificate by sex, females (451) outnumbered males (394) from 2016 to 2020 (Table 20.5j).

POPULATION AND DEVELOPMENT

Revision of the National Population Policy 1995

Due to the changes in Jamaica’s demographic landscape (size, structure, composition and distribution), it was necessary for a revision of the 1995 National Population Policy. Work was advanced on the drafting of a revised Policy. The overall purpose of the Policy is to expand the framework and strategies for the continued integration of population dynamics into sustainable development. Consultations relating to the development of the Programme of Action (PoA) for the Policy were convened with representatives from ministries, departments and agencies (MDAs), private sector and non-governmental organizations.

Modernization Programme of the Civil Registration and Vital Statistics System

In spite of the negative effects of COVID-19, Jamaica continued its efforts to implement initiatives aimed at improving its national civil registration and vital statistics system, through the strengthening and building of capacities within government and by improving the accuracy and quality of data collection and production. Two major initiatives were conducted over the period.

- ICD-10³⁰ Mortality Training:
 - With medical record practitioners, RGD coders and other government stakeholders.

TABLE 20.5j
APPROVED APPLICATIONS OF CSME CERTIFICATES FOR JAMAICANS BY SEX, 2013–2020

	2013	2014	2015	2016	2017	2018	2019	2020 ^p
MALE	105	226	185	121	105	71	68	41
FEMALE	99	219	108	113	112	76	100	62
TOTAL	204	445	293	234	217	147	168	103
PERCENTAGE								
	2013	2014	2015	2016	2017	2018	2019	2020
MALE	51.5	50.8	63.1	51.9	48.4	48.1	40.5	39.8
FEMALE	48.5	49.2	36.9	48.1	51.6	51.9	59.5	60.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

NOTE:

p – provisional

Source: Work Permits Department, Ministry of Labour and Social Security

29. The Caribbean Single Market and Economy (CSME) Certificate was introduced in 1997. There is no record of any Jamaican receiving a CSME certificate between 1997 and 2003.

30. International Statistical Classification of Diseases and Related Health Problems, accessed May 20, 2021, <https://www.who.int/standards/classifications/classification-of-diseases>

Training was conducted in St Ann, St Mary and Portland over the period, March 11–13, with 19 individuals participating.

- Development of a National Divorce Database to be housed at the RGD: Project Agreement developed; and Microsoft licences and UPS devices procured.

UN Commission on Population and Development

The fact-to-face meetings of the 53rd Session of the Commission were not held, due to COVID-19 restrictions. Online meetings and consultations on the draft resolution and draft decisions were, however, convened. In accordance with Economic and Social Council decisions 2020/205, 2020/206 and 2020/219, outcomes of the 53rd Session were adopted via silence procedure.³¹

Meeting of the Conference on Population and Development in Latin America and the Caribbean

A virtual meeting entitled “Briefing of Ministers and High-Level Authorities of Machineries for the Advancement of Women in Latin America and the Caribbean: The response to the COVID-19 pandemic crisis from a gendered perspective” was held on April 8 in Santiago, Chile. The meeting organized by the Economic Commission for Latin America and the Caribbean (ECLAC) presented an initial mapping of initiatives to address gender dimensions in the responses to the pandemic in the Latin American and Caribbean countries. It is expected that this mapping exercise will form an updated digital repository, which will be made available to countries in the region. The objectives of the meeting were to:

- analyse the different economic and social scenarios of the current crisis and its differentiated impacts on women in the short, medium and long term
- share information on the main initiatives that the governments of the region are carrying forward, with special consideration for the needs of women and gender inequalities in the framework of the current crisis
- analyse the available data on a possible increase in violence against women and femicide/feminicide, and discuss prevention and response measures in relation to COVID-19
- promote regional, sub-regional and bilateral cooperation initiatives that support a coordinated response to the coronavirus crisis, by incorporating lessons learned from the region and other parts of the world.

Global Forum on Migration and Development (GFMD)

The 12th GFMD was held in Quito, Ecuador in January, under the theme “Sustainable Approaches to Human Mobility: Upholding Rights, Strengthening State Agency, and Advancing Development through Partnerships and Collective Action”. The event was attended by ministers, vice ministers and mayors from all regions of the world, as well as a broad range of public and non-governmental decision-makers, experts and practitioners in migration and development fields.

In line with the tradition of the GFMD, the three-day summit included roundtable discussions, and special and plenary sessions. The main aim of the summit was to showcase how technology and entrepreneurship can contribute to better migration management. Additionally, for the first time, three multi-stakeholder mechanisms of the GFMD—the Civil Society Days, the Business Meeting and the Mayoral Forum—were held. The outcome of the meeting was to promote consistent and transparent migration policies that reflect sound business practices.

Monitoring Implementation of the National Policy on International Migration and Development

The Government of Jamaica continued its efforts in the implementation of Phase III of the Global Migration Group (GMG) Making Migration Work for Sustainable Development Programme for the period 2019–2023. During the year, approximately 200 copies of the National IMD Policy were printed and distributed. Mainstreaming migration activities varied across the nine thematic areas of the IMD Policy, along with its accompanying Implementation Strategy.

The following initiatives for mainstreaming migration into national development were undertaken over the period:

- Jamaica provided technical advice to the Government of Belize towards the development of their International Migration and Development Policy. This was possible through virtual exchanges, focus group discussions and shared resources on Jamaica’s policy formulation and implementation processes.
- In October, Jamaica along with five other countries (Canada, Djibouti, Ireland, Moldova and Nigeria) confirmed participation in the Migration Data Project for the development of a Global Migration Data Portal, an international comparative study aimed at getting a better understanding of how countries are meeting the wide range of migration data challenges. Between October and December, Jamaica worked

31. Silence Procedure is a decision-making method used to formally adopt resolutions, inter alia, by the United Nations and other international bodies within a set timeframe, usually 72 hours. The procedure is mostly used during a crisis.

with IOM's Global Migration Data Analysis Centre (GMDAC) and national migration stakeholders in key ministries, department and agencies, civil society, NGOs and academia to gather data and other critical information to populate the portal. The portal will serve as a unique access point to timely, comprehensive migration statistics and reliable information about migration data globally.

Through ongoing work with IOM's local office, several project documents were developed in support of the implementation of national and regional projects/initiatives. These include:

- continued work under the joint GOJ/USA initiative/project to develop a Child Protection Compact (CPC). This compact supported existing anti-trafficking efforts of the GOJ and civil society to combat all forms of child trafficking.
- development of a draft Jamaica Diaspora Engagement Strategy in partnership with the Ministry of Foreign Affairs and Foreign Trade (MFAFT).
- endorsement of a project proposal, "Strengthening the Disaster Risk Management and Preparedness Capacity of the GOJ", under the Migrants in Countries of Crisis (MICIC) project. Initial discussion commenced with key representatives of the GOJ and IOM on the benefits to be gained under this initiative.
- implementation of the IOM-led Trafficking in Persons Component of the Multi-Country Border Security Programme, being funded by the European Union (EU) in three countries in the region—Haiti, Dominican Republic and Jamaica.

The provision of support to lead MDAs in the development of migration-related policies/plans/publications continued, as follows:

- Partnership with the Ministry of Labour and Social Security, and IOM in hosting Virtual Regional Labour Migration Capacity Building Sessions, as well as the publishing of three Labour Mobility Studies:
 - Circular Labour Migration in Jamaica: An Assessment of the Existing Recruitment Regulatory and Monitoring Mechanisms
 - Circular Labour Migration in Jamaica: Mapping the Labour Supply Chains for Government and Private Sector Programme
 - An Assessment of the Government of Jamaica's Pre-Departure Orientation Curriculum for the Short-term Circular Migration Programme

- Collaboration with the Ministry of Foreign Affairs and Foreign Trade in the revision and submission of the Draft Diaspora and Development Policy for tabling as a Green Paper in Cabinet.

United Nations Population Fund (UNFPA) Country Programme for Jamaica

The UNFPA continued to provide technical and financial assistance to bolster the country's programmes and initiatives for SRH; Population and Development; and Adolescents and Youth. In an effort to increase national capacity to effectively integrate SRH services into policies and programmes, the following activities were undertaken:

- commissioning of a report on a SRH legislative review of Jamaica and 21 other English and Dutch-speaking Caribbean countries.
- completion of a SWOT analysis of the Rural Health Clinics in 16 countries across the Caribbean (including Jamaica). The analysis identified the extent to which the pandemic is adversely impacting supply chains, including potential stock-outs of contraceptives, and the impact on key SRH indicators (unplanned pregnancies, maternal and neonatal deaths) and Couple Year Protection (CYPL)³² loss. The findings will further strengthen reproductive health supply chains.
- support provided to the Caribbean Regional Midwives Association (CRMA) through capacity-building webinars. The webinars focused on infection control measures, updates and training on guidelines related to COVID-19 and maternal care. The webinars also focused on mental health and infection prevention in maternal settings, as well as family planning service continuity.

With respect to Adolescents and Youth, the UNFPA's main focus was to increase national capacity to advocate for and deliver SRH related programmes and provide access to SRH services for adolescents, with focus on vulnerable and marginalized groups. Through this initiative, a baseline assessment of selected risk factors of pregnancy among high school students was conducted in Eastern Jamaica. A Rapid Assessment of Young People's Needs during the COVID-19 pandemic, across the English and Dutch-speaking Caribbean was also conducted.

The UNFPA provided technical support to STATIN in preparation of the 2022 Population and Housing Census in Jamaica. The support included: revision of the overall census operation plans; questionnaire and related forms; training manuals; and coding and editing instructions.

32. Couple Years Protection is "the estimated protection provided by contraceptive methods during a one-year period, based upon the volume of all contraceptives sold or distributed free of charge to clients during that period." 'Couple Years of Protection (CYP)', accessed May 10, 2021, <https://www.usaid.gov/global-health/health-areas/family-planning/couple-years-protection-cyp>

This was done in order to develop a control programme and procedures for pre-enumeration and enumeration activities.

Support was also provided for capacity-building initiatives, including: psychosocial support for adolescent girls and young women who are survivors of gender-based violence; support and counselling for survivors of violence through the GBV helplines; and the development and delivery of gender-responsive tools. Additionally, the UNFPA supported the GOJ in the establishment of the first of three state-run shelters for victims of GBV and collaborated with national authorities and key stakeholders in Jamaica to develop GBV service mappings and referral pathways, which were also updated to the COVID-19 context. Technical and financial support was provided to procure other essential GBV resources (see section on Gender-Based Violence in chapter 25).

The Jamaican Diaspora

The Ministry of Foreign Affairs and Foreign Trade (MFAFT) continued its efforts to strengthen links between Jamaicans at home and in the diaspora. In an effort to further strengthen engagement of the Diaspora in national development, two important mechanisms were established: the Global Jamaican Diaspora Council (GJDC), successor to the Jamaica Diaspora Advisory Board; and the Global Jamaican Diaspora Youth Council (GJDYC). These were deliverables of the 8th Biennial Diaspora Conference held in June 2019.

Despite the challenges caused by the pandemic, several initiatives were undertaken in the main destination countries to increase engagement between the Diaspora and the Jamaican High Commission. These included:

- virtual Jamaica 58th Independence celebrations. A network of Jamaican Canadian organizations collaborated to execute the event in celebration of Jamaica's rich cultural heritage.
- tablet drive by a Jamaican residing in Japan to purchase 50 tablets for students in rural Jamaica.
- COVID-19 Community Outreach Response for displaced immigrants in the US. A crisis management programme was instituted, which included food distribution, pro bono medical care and the establishment of a community response team of Jamaicans.
- successful deployment and execution of an Emergency Plan for Stranded Nationals in accredited states under the jurisdiction of Jamaica's Missions, which provided critical support to hundreds of nationals.
- launch of Jamaica's Mission Tablet and Laptop Initiative: A Device for Every Child - Bridging the Digital Divide, which saw the mobilization of approximately US\$150 000.00 by the end of December 2020.
- negotiation with Microsoft for 100 000 free Microsoft licences, which were applied to laptops previously purchased. A total of 832 tablets were also purchased and donated under the Consul General's Tablet and Laptop Initiative, to Jamaican students in need of remote learning devices.
- launch of the Jamaica Mission's Economic Diplomacy Programme by way of meetings with business authorities and financial institutions, with a view to exploring deepened economic cooperation for Jamaica and Jamaicans in the Diaspora.
- support to vulnerable persons by the Jamaican High Commission in London in collaboration with Jamaican companies and community groups throughout the March to June lockdown. Among the support granted were accommodation, food parcels and supermarket vouchers. Repatriation of stranded Jamaicans, including ship workers in the UK, was also facilitated across three special charter flights.
- a Diaspora meeting hosted by the High Commission in the UK on education and health held to discuss challenges faced by charities that support the health sector in Jamaica. A similar meeting was also held with the diaspora education umbrella group that provided school supplies and funds to four infant and primary schools in the Zones of Special Operations (ZOSO) in Jamaica.
- two fundraising telethons in Canada by the Strategic COVID-19 Planning Committee in May and June, with respect to vulnerable Jamaicans. Both events raised over CAN\$14 000.00. Funds were later used to purchase grocery and care packages.

OUTLOOK

Despite the unprecedented challenges experienced by the Jamaican population in 2020, including facing a pandemic, the adaptability of national population and development actors was seen in their commitment and resilience. To ensure business continuity in 2021, population and development initiatives at the national, regional and international levels will be facilitated through webinars and other virtual fora.

The 1995 National Population Policy will be revised and rebranded as the National Population and Sustainable Development Policy and Plan of Action. The revised Policy is expected to be adopted by the Cabinet as a White Paper in 2021 and provide the new framework for the integration of population dynamics in development planning.

Preparation for the next Population and Housing Census will continue in 2021. The census, scheduled to be conducted in April 2021, has been rescheduled to 2022, due to the uncertainties regarding the health and the safety

risks posed by the pandemic to census personnel and respondents.-

In an effort to improve SRH among the Jamaican population, in particular adolescents, the Ministry of Health and Wellness will revise the National Strategic Plan for Pre-adolescents and Adolescents; continue the review of the Draft National Integrated Sexual Reproductive Health Policy; and further implement an Adolescent Standards and Criteria islandwide. Additionally, data collection is expected to begin in 2021 on the risk factors of pregnancy among high school students in Eastern Jamaica. Findings from the “Rapid Assessment of Young People’s Needs during the COVID-19 Pandemic”, which was supported by UNFPA will be compiled and disseminated to key stakeholders.

The NFPB will partner with the Inter-American Development Bank to execute a programme to improve the availability and uptake of family planning methods—long-acting reversible contraceptives, LARC—by sexually active adolescent mothers, 16 years and over. The campaign material is scheduled to be launched in the first quarter of 2021 on social media, television, radio and in the print media. The target for the project, which runs until December 2021, is set at 500 girls receiving LARC and 15 doctors trained in Jadelle insertion.

Training of interviewers for the pre-test phase of the Reproductive Health Survey RHS is expected to be completed in 2021, and interviewers will conduct the fieldwork for the pre-test in selected parishes—Kingston, St Andrew and St. Catherine. Another phase of training

for the ‘Pilot’ phase of the survey will be carried out by STATIN. The pilot will be done using computer-assisted personal interviewing (CAPI), unlike the pre-test, which will be paper-based.

The JFPA has identified four priority areas for 2021, each of which will require research, monitoring and evaluation, and service promotion. The four areas are:

- Reducing missed clinical appointments
- Increasing services use (using a combination of old and new marketing techniques)
- Increasing male engagement
- Adolescent and youth outreach.

In an effort to promote networking, rehabilitation and investment in Jamaica, the following initiatives will be undertaken:

- hosting of an ‘Investing in Jamaica Virtual Forum’ in partnership with the Jamaica Stock Exchange in order to sensitize the Diaspora and Friends of Jamaica of investment opportunities in Jamaica and the USA.
- development of a community online handbook for new Jamaican immigrants to Canada.
- implementation of a reintegration programme for Involuntary Returned Migrants (IRMs) from Canada.

In the upcoming year, Jamaican delegates will participate in the 54th Session of the United Nations Commission on Population and Development, which will be held under the theme “Population, food security, nutrition and sustainable development”. ■

THE LABOUR MARKET

INTRODUCTION

Labour market development continued to be buttressed by: Vision 2030 Jamaica – National Development Plan; the Medium-Term Socio-Economic Policy Framework (MTF) 2018–2021; the 2030 Agenda for Sustainable Development (2030 Agenda); and the International Labour Organization’s Decent Work Agenda. The Jamaican labour market exhibited poor performance across key indicators during the year. The average annual size of the labour force and the employed labour force contracted, while there was a rise in

unemployment. A downward trend was also observed for work permit applications and in the number of participants in the overseas employment programme.

These developments were influenced primarily by the global outbreak of the novel coronavirus disease 2019 (COVID-19), which was declared a pandemic. This public health event created unprecedented disruptions to socio-economic development and triggered a parallel economic crisis during the year. The crises magnified vulnerabilities and deficiencies within the local labour market and economy, as

TABLE 21.1
MAIN LABOUR FORCE INDICATORS BY SEX, 2019–2020
(’000)

MAIN INDICATOR	2019 ^r					2020 ^p			
	January	April	July	October	Annual Average	January	July	October	Annual Average
BOTH SEXES									
Labour Force	1 340.2	1 349.9	1 360.8	1 345.1	1 349.0	1 369.5	1 279.6	1 293.0	1 314.0
Employed Labour Force	1 232.7	1 244.5	1 254.1	1 248.4	1 244.9	1 269.1	1 118.3	1 154.1	1 180.5
Unemployed Labour Force	107.5	105.4	106.7	96.7	104.1	100.4	161.3	138.9	133.5
Outside The Labour Force	746.9	736.9	726.0	741.5	737.8	717.0	806.6	793.1	772.2
Unemployment Rate (%)	8.0	7.8	7.8	7.2	7.7	7.3	12.6	10.7	10.2
Job Seeking Rate (%)	5.0	4.8	5.2	4.6	4.9	5.0	7.5	6.6	6.3
Labour Force as a % age of Population 14+	64.2	64.7	65.2	64.5	64.6	65.6	61.3	62.0	63.0
MALE									
Labour Force	717.0	731.4	735.9	726.1	727.6	733.7	700.6	702.1	712.1
Employed Labour Force	673.5	691.5	693.2	682.8	685.3	690.3	620.1	641.1	650.5
Unemployed Labour Force	43.5	39.9	42.7	43.3	42.4	43.4	80.5	61.0	61.6
Outside The Labour Force	307.3	292.8	288.3	298.0	296.6	290.4	323.3	321.8	311.8
Unemployment Rate (%)	6.1	5.5	5.8	6.0	5.8	5.9	11.5	8.7	8.7
Job Seeking Rate (%)	4.0	3.3	3.9	3.8	3.8	4.3	7.2	5.4	5.6
Labour Force as a % age of Population 14+	70.0	71.4	71.9	70.9	71.0	71.6	68.4	68.6	69.5
FEMALE									
Labour Force	623.2	618.5	624.9	619.0	621.4	635.8	579.0	590.9	601.9
Employed Labour Force	559.2	553.0	560.9	565.6	559.7	578.8	498.2	513.0	530.0
Unemployed Labour Force	64.0	65.5	64.0	53.4	61.7	57.0	80.8	77.9	71.9
Outside The Labour Force	439.6	444.1	437.7	443.5	441.2	426.6	483.3	471.3	460.4
Unemployment Rate (%)	10.3	10.6	10.2	8.6	9.9	9.0	14.0	13.2	12.0
Job Seeking Rate (%)	6.1	6.7	6.7	5.6	6.3	5.7	7.9	8.0	7.2
Labour Force as a % age of Population 14+	58.6	58.2	58.8	58.3	58.5	59.8	54.5	55.6	56.7

NOTE:

Annual averages calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

the implementation of restrictive measures impeded external and internal mobility, which affected business activity and employment. Stemming the spread of the virus and facilitating a speedy recovery of the economy therefore became the top priorities of the government.

LABOUR FORCE AND EMPLOYMENT

The analysis presented in this section is based on data from quarterly Labour Force Surveys (LFS) conducted by the Statistical Institute of Jamaica (STATIN). STATIN's official definitions are therefore used for all concepts, unless otherwise stated. While analysis will focus primarily on

LFS data collected in 2020, in most instances comparisons will be made with revised LFS data collected in 2019. This will highlight changes in the main labour market indicators, using simple averages of the quarterly survey data provided by STATIN. Data for 2020 are preliminary and are therefore subject to change. The LFS was not fielded for the April 2020 quarter due to restrictions associated with the pandemic.

The Labour Force¹

The labour force contracted by 2.6 per cent to average 1 314 033 persons compared with 1 349 000 in 2019. This

TABLE 21.2
LABOUR FORCE BY AGE GROUP AND SEX, 2019–2020
(’000)

AGE GROUP	2019 ^r					2020 ^p				
	January	April	July	October	Annual Average	January	July	October	Annual Average	
BOTH SEXES										
TOTAL	1 340.2	1 349.9	1 360.8	1 345.1	1 349.0	1 369.5	1 279.6	1 293.0	1 314.0	
14-19	32.2	35.1	39.6	37.8	36.2	41.1	36.5	36.5	38.0	
20-24	167.2	166.8	174.2	167.6	169.0	169.4	157.0	157.8	161.4	
25-34	357.9	358.8	353.9	354.5	356.3	360.4	329.3	340.2	343.3	
35-44	316.3	315.6	321.0	317.2	317.5	320.1	306.5	303.4	310.0	
45-54	257.0	260.2	258.6	254.6	257.6	261.1	247.2	251.5	253.3	
55-64	143.2	143.9	145.7	145.0	144.5	145.3	139.5	140.0	141.6	
65 and over	66.4	69.5	67.8	68.4	68.0	72.1	63.6	63.6	66.4	
MALE										
TOTAL	717.0	731.4	735.9	726.1	727.6	733.7	700.6	702.1	712.1	
14-19	19.1	20.4	22.2	21.9	20.9	24.3	24.2	23.0	23.8	
20-24	90.6	92.7	96.6	92.0	93.0	92.2	88.6	86.5	89.1	
25-34	183.7	184.8	185.0	185.3	184.7	183.4	172.5	175.4	177.1	
35-44	159.5	161.4	161.8	162.1	161.2	161.9	155.8	156.0	157.9	
45-54	138.2	141.1	140.8	136.3	139.1	138.7	135.3	135.6	136.5	
55-64	81.6	84.4	84.4	83.5	83.5	84.2	82.6	82.7	83.2	
65 and over	44.3	46.6	45.1	45.0	45.3	49.0	41.6	42.9	44.5	
FEMALE										
TOTAL	623.2	618.5	624.9	619.0	621.4	635.8	579.0	590.9	601.9	
14-19	13.1	14.7	17.4	15.9	15.3	16.8	12.3	13.5	14.2	
20-24	76.6	74.1	77.6	75.6	76.0	77.2	68.4	71.3	72.3	
25-34	174.2	174.0	168.9	169.2	171.6	177.0	156.8	164.8	166.2	
35-44	156.8	154.2	159.2	155.1	156.3	158.2	150.7	147.4	152.1	
45-54	118.8	119.1	117.8	118.3	118.5	122.4	111.9	115.9	116.7	
55-64	61.6	59.5	61.3	61.5	61.0	61.1	56.9	57.3	58.4	
65 and over	22.1	22.9	22.7	23.4	22.8	23.1	22.0	20.7	21.9	

NOTE:

Annual averages calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

1. The labour force consists of individuals 14 years and over who were “employed in any form of economic activity for one hour or more during the survey week”, and persons who were unemployed, that is, “although they had no job, were looking for work, or wanted and were willing to accept work during the reference week”.

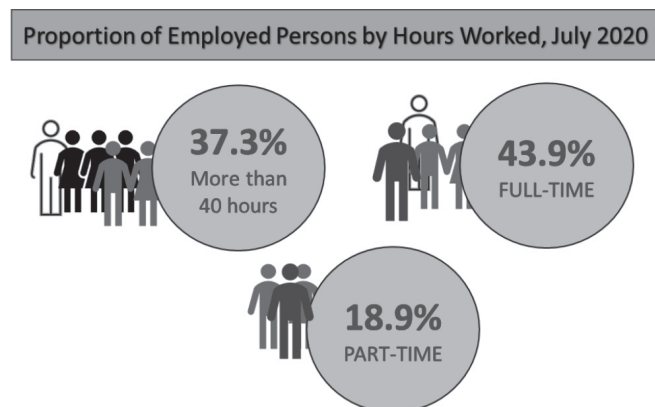
contraction resulted from the loss of an average 34 967 persons (19 500 females) from the labour force (Table 21.1). Males accounted for 54.2 per cent of the total labour force despite a reduction for both sexes in the labour force. As is typical in periods of economic downturn, labour force participation declined, registering a rate of 63.0 per cent, a 1.6 percentage point fall. Both male and female participation rates lessened, to 69.5 per cent and 56.7 per cent, respectively.

Persons in the prime working age group² (25–54 years) accounted for 69.0 per cent of the total labour force, while youth (14–24 years) accounted for 15.2 per cent. The proportion of persons in the 65 years and older age group remained steady at 5.0 per cent of the labour force (Table 21.2).

The number of persons outside the labour force increased by 4.7 per cent to 772 233. Consistent with the previous year, the number of females outside the labour force (460 400) continued to exceed males (311 833). The 25–54 years age group accounted for 22.6 per cent of persons outside the labour force, with females accounting for 69.6 per cent in this age group.

Employment

Employment was impacted by the pandemic as economic activity slowed during the year. Employment was largely driven by increases in the Information & Communication and the Real Estate and Other Business Service industries. Despite fluctuations in quarterly movements, annual average employment contracted by 5.2 per cent to 1 180 500. Employment peaked in January, at 1 269 100, surpassing the previous record set in July 2019; nonetheless, high employment levels were not sustained throughout the year (Table 21.3). Alongside reduced employment levels, the impact of the pandemic was also seen in reduced working hours as business activity declined in response to the restrictions implemented to contain the spread of the virus.



Data from a COVID-19 special module of the July 2020 quarterly Labour Force Survey showed an increase in the number of persons who worked fewer hours per week and a reduction in the number of persons who worked for 35 hours or more per week. It was reported that 211 000 persons worked part-time (34 hours or less) compared with the 116 000 recorded in July 2019. On the other hand, there was a 17.4 per cent reduction in the number of persons that reported working 35–40 hours per week to 490 700 persons compared with the corresponding period in 2019.

Employment by Age and Sex

The labour force survey documented an average decline of 5.3 per cent (29 675 persons) and 5.1 per cent (34 750 persons) for female and male employment, respectively (Table 21.3). The falloff in female employment eroded gains made, in the previous year, in reducing unemployment and economic inactivity among females. Males continued to occupy the largest share of overall employment at 55.1 per cent.

The downturn in employment was observed in all four major demographic groups, with the largest in absolute terms occurring among adult males (25 years and over); a shrinkage of 26 750 (4.5 per cent) to 563 800 (Table 21.3). While the pandemic has affected employment generally, it has had a considerable impact on youth (14–24 years) employment, which recorded a 9.0 per cent average decrease to 148 133 employed youth. Female youth employment registered the highest percentage decline, of 9.8 per cent, followed by an 8.4 per cent decline in male youth employment. On the other hand, employment among adults (25 years and over) averaged 1 032 367, reflecting a 4.6 per cent increase compared with 2019.

Employment by Employment Status

Employment in five of the six categories of employment status showed a decline (Table 21.4). Both the private and public sectors recorded increased levels of employment. The former grew by 4.1 per cent to 615 950 and the latter by 7.3 per cent to 158 450. The number of Employers declined by 1.0 per cent to 44 325, spurred by a 12.8 per cent reduction in female Employers to 12 800. The number of persons classified as Own Account Workers also fell, by 1.1 per cent to 413 425; this was reflected by a 2.3 per cent decline in male Own Account Workers to 255 175. Females continued to dominate employment in the public sector (61.0 per cent), while the proportion of males in private sector employment remained steady at 54.0 per cent. In absolute terms, males employed in the private sector increased by 11 225 to 331 625. The proportion of the

2. The international and national classification of the prime working age population is persons aged 25–54 years.

TABLE 21.3
EMPLOYED LABOUR FORCE BY AGE GROUP AND SEX, 2019–2020
(’000)

SEX AND AGE	2019 ^r					2020 ^p			
	January	April	July	October	Annual Average	January	July	October	Annual Average
MALE									
TOTAL	673.5	691.5	693.2	682.8	685.3	690.3	620.1	641.1	650.5
Youth (14-24 yrs.)	90.1	96.7	98.8	93.2	94.7	96.1	80.6	83.4	86.7
Adults (25 yrs. and over)	583.4	594.8	594.4	589.6	590.6	594.2	539.5	557.7	563.8
25-34	171.1	174.3	174.0	174.0	173.4	171.6	149.9	161.5	161.0
35-44	154.3	155.3	157.6	156.7	156.0	156.7	144.7	146.2	149.2
45-54	134.3	137.1	137.0	133.2	135.4	135.7	126.3	128.2	130.1
55 yrs. and over	123.7	128.1	125.8	125.7	125.8	130.2	118.6	121.8	123.5
FEMALE									
TOTAL	559.2	553.0	560.9	565.6	559.7	578.8	498.2	513.0	530.0
Youth (14-24 yrs.)	66.0	65.9	71.7	68.9	68.1	74.4	54.0	55.9	61.4
Adults (25 yrs. and over)	493.2	487.1	489.2	496.7	491.6	504.4	444.2	457.1	468.6
25-34	153.5	153.2	150.2	154.7	152.9	159.0	131.8	141.0	143.9
35-44	145.9	140.5	145.5	145.7	144.4	146.7	135.9	134.8	139.1
45-54	113.1	113.7	112.5	113.2	113.1	117.3	103.0	106.7	109.0
55 yrs. and over	80.7	79.7	81.0	83.1	81.1	81.4	73.5	74.6	76.5
TOTAL	1 232.7	1 244.5	1 254.1	1 248.4	1 244.9	1 269.1	1 118.3	1 154.1	1 180.5

NOTE:

Annual averages calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

TABLE 21.4
EMPLOYED LABOUR FORCE BY EMPLOYMENT STATUS, 2019–2020
(’000)

EMPLOYMENT STATUS	2019 ^r					2020 ^p			
	January	April	July	October	Annual Average	January	July	October	Annual Average
Paid Government Employee	150.2	155.9	161.9	165.8	158.5	154.6	151.5	153.5	153.2
Paid Non-Government Employee	615.4	619.5	615.5	613.4	616.0	637.7	525.0	548.1	570.3
Unpaid Worker	12.1	9.3	11.2	11.3	11.0	10.3	10.1	12.0	10.8
Employer	40.6	46.8	45.6	44.3	44.3	46.5	46.0	48.3	46.9
Own Account Worker	413.0	410.6	418.3	411.8	413.4	417.6	385.2	391.1	398.0
Not Reported	1.4	2.4	1.6	1.8	1.8	2.4	0.5	1.1	1.3
TOTAL	1 232.7	1 244.5	1 254.1	1 248.4	1 244.9	1 269.1	1 118.3	1 154.1	1 180.5

NOTE:

Annual averages calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

TABLE 21.5
EMPLOYED LABOUR FORCE BY INDUSTRY, 2019–2020
(‘000)

	2019 ^r				2020 ^p			
	January	July	October	Annual Average	January	July	October	Annual Average
I. GOODS PRODUCING INDUSTRY								
Agriculture, Hunting, Forestry & Fishing	187.5	188.9	188.0	188.1	188.1	186.0	189.6	187.9
Mining & Quarrying	7.9	6.9	6.5	7.1	4.8	5.1	5.2	5.0
Manufacturing	74.0	83.3	75.2	77.5	74.3	73.2	70.0	72.5
Construction	108.6	111.1	104.3	108.0	107.6	92.1	100.4	100.0
II. SERVICES INDUSTRY								
Electricity, Gas and Water Supply	13.1	9.7	12.4	11.7	10.1	7.0	8.9	8.7
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	246.6	236.3	238.7	240.5	259.7	219.6	224.9	234.7
Transport and Storage	66.8	65.6	64.2	65.5	68.6	51.8	60.6	60.3
Accommodation and Food Service Activities	106.6	111.7	105.8	108.0	110.8	78.8	82.8	90.8
Information and Communication	13.3	13.6	14.6	13.8	12.4	14.1	16.1	14.2
Financial and Insurance Activities	26.2	28.0	28.0	27.4	26.8	24.7	26.3	25.9
Real Estate and Other Business Services	88.6	95.3	94.3	92.7	98.7	92.6	104.7	98.7
Public Administration and Defence; Compulsory Social Security	60.2	66.6	70.5	65.8	65.5	66.1	63.9	65.2
Education, Human Health and Social Work Activities	101.9	108.9	112.5	107.8	109.1	100.4	101.6	103.7
Arts, Entertainment, Recreation and Other Services	127.8	126.8	132.2	128.9	130.1	105.7	96.4	110.7
INDUSTRY NOT SPECIFIED	3.6	1.4	1.2	2.1	2.5	1.1	2.7	2.1
TOTAL	1 232.7	1 254.1	1 248.4	1 245.1	1 269.1	1 118.3	1 154.1	1 180.5

NOTE:

Annual averages calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Data on industry reflects changes made in July 2020 from the 2005 edition to the 2016 edition of the Jamaica Industry Classification, which has implications for industry composition. Therefore, annual average employment by industry represents data for the 2019 and 2020 January, July and October quarters of the Labour Force Survey.

Source: Statistical Institute of Jamaica

employed categorised as Unpaid Workers contracted by 100 to 10 975. In spite of this, females continued to account for 65.1 per cent of Unpaid Workers (7 150).

Employment by Industry³

Table 21.5 presents employment data disaggregated by industry, which for the purpose of analysis, is divided into two categories, Goods Producing and Services.



3. Data on industry reflects changes made in July 2020 from the 2005 edition to the 2016 edition of the Jamaica Industry Classification, which has implications for industry composition. Therefore, annual average employment by industry represents data for the 2019 and 2020 January, July and October quarters of the Labour Force Survey.

Goods Producing Industries

Employment across all the Goods Producing industries contracted by 4.0 per cent due to reduced output associated with the pandemic. Agriculture, Forestry & Fishing continued to be the largest goods-producing employer of labour, despite a slight decline in employment, and accounted for 51.4 per cent of all goods producing employment and 15.9 per cent of total employment. The decline in employment in the Agriculture industry may be attributed to weather-related shocks (drought and flooding) and reduced demand from the tourism sector (see chapter on Agriculture). Manufacturing also exhibited signs of a decline, with average employment declining by 6.5 per cent to 72 500 persons. This was attributed to factory closures and lower demand resulting from the effects of the pandemic and efforts to stem the spread of COVID-19.

The Construction industry recorded the most significant decline, an average 7 967 persons (7.4 per cent), likely due to reduced output in building construction and installation (residential and non-residential projects). The Mining and Quarrying industry accounted for 0.4 per cent of aggregate employment (5 033 persons) and recorded a decline of 29.1 per cent in annual average employment relative to the previous year. The decline in employment in the Mining & Quarrying industry stemmed mainly from the closure of the Alpart Refinery in the latter part of 2019. Additionally, the completion of several major road infrastructure projects in 2019 contributed to lower demand in the Quarrying sub-industry (see chapter on Mining & Quarrying). These developments in 2019 affected employment levels in early 2020 as there was a 39.2 per cent decline in the January quarter compared with the corresponding quarter in 2019.

Services Industries

Services continued to play a central role in the economy and accounted for approximately 69.0 per cent of overall employment. Employment in the Services industries (812 933 persons) experienced an average decline of 5.7 per cent, as eight out of ten service industries demonstrated reduced employment. These declines were largely due to the pandemic and efforts to suppress same, as most planned entertainment, cultural activities and shows were cancelled or postponed in line with protocols under the Disaster Risk Management Act, which significantly restricted movement within and in to the country. The Services industries that experienced the highest levels of decline were the Arts, Entertainment, Recreation and Other Services industry, which declined by 18 200 persons; and, the Accommodation and Food Service Activities

industry, down by 17 233 persons. The Accommodation sub-industry was directly affected by restrictions on global travel and border closures that stymied visitor arrivals from major source markets and earnings from tourism (see chapter on Hotels & Restaurants).

Two service industries exhibited increases in employment — Real Estate and Other Business Services, by 5933 persons, and Information and Communication by 367 persons. The expansion in the Real Estate and Other Business Services industry may likely be attributed to increased employment in the outsourcing sector, which showed signs of rebounding in the latter part of the year from an initial drop in the number of employed persons during the early stages of the pandemic. Increased employment in the Information and Communication industry was likely due to increased activities in the telecommunications sub-group. This was reflected in the expanded application of the remote work modality and e-commerce operations arising from the pandemic, which resulted in greater utilisation of and reliance on information and communication technologies.

Unemployment⁴

The annual average unemployment rate was 10.2 per cent, a 2.5 percentage point increase relative to 2019 as an average of 133 533 persons were recorded as unemployed (Table 21.6). There was a record level of job losses (135 800) for July 2020 compared with the corresponding period in 2019, and a quarterly unemployment rate of 12.6 per cent. This mainly reflected the impact of COVID-19 and measures implemented to halt the spread of the virus locally and globally. As a consequence, the previous seven-year downward trend in the unemployment rate was reversed. Unemployment increased across age groups and sex. The average unemployed youth (14–24 years) population increased by 21.1 per cent to 51 233, resulting in a youth unemployment rate of 25.7 per cent. The adult (25 years and over) unemployed population averaged 82 300 persons, a rise of 33.2 per cent, with an adult unemployment rate of 7.4 per cent. Female unemployment grew by 16.5 per cent to 71 900 females; and male unemployment grew by 45.5 per cent to 61 633.

LABOUR MIGRATION

Labour migration continued to be a prevailing feature of the Jamaican labour market. Labour shortages in developed countries—affected by the current pattern of demographic change, and the inability of many to

4. Unemployment, in keeping with the standard relaxed international definition that allows for the inclusion of those not “seeking work”, refers to persons who are without work and currently available for work, whether actively looking for work (seekers) or not (non-seekers).

TABLE 21.6
UNEMPLOYMENT BY MAJOR DEMOGRAPHIC GROUPS, 2019–2020
 ('000)

	2019 ^r						2020 ^p				
	January	April	July	October	Annual Average	Rate (%)	January	July	October	Annual Average	Rate (%)
TOTAL	107.5	105.4	106.7	96.7	104.1	7.7	100.4	161.3	138.9	133.5	10.2
Youth (14-24 yrs.)	43.4	39.3	43.2	43.3	42.3	20.6	40.0	58.9	54.8	51.2	25.7
Adults (25 yrs. and over)	64.1	66.1	63.5	53.4	61.8	5.4	60.4	102.4	84.1	82.3	7.4
MALE	43.5	39.9	42.7	43.3	42.4	5.8	43.4	80.5	61.0	61.6	8.7
Youth (14-24 yrs.)	19.6	16.4	19.9	20.7	19.15	16.8	20.4	32.2	26.0	26.2	23.2
Adults (25 yrs. and over)	23.9	23.5	22.8	22.6	23.2	3.8	23.0	48.3	35.0	35.4	5.9
FEMALE	64.0	65.5	64	53.4	61.7	9.9	57.0	80.8	77.9	71.9	11.9
Youth (14-24yrs.)	23.8	22.9	23.3	22.6	23.2	25.4	19.6	26.7	28.8	25.0	28.9
Adults (25 yrs. and over)	40.2	42.6	40.7	30.8	38.6	7.3	37.4	54.1	49.1	46.9	9.1

NOTE:

Annual averages and rates calculated by PIOJ

Discrepancies are due to rounding

p – preliminary

r – revised

Source: Statistical Institute of Jamaica

find suitable employment that can adequately support themselves and their families in countries of origin—in addition to other factors, continue to influence labour migration. The Ministry of Labour and Social Security (MLSS) provides oversight for the inflow and outflow of migrant workers through its Work Permit department and Overseas Employment Programme, respectively.

Work Permits⁵

Under the Foreign Nationals and Commonwealth Citizens (Employment) Act, 1964, foreign nationals who wish to work in Jamaica must first apply to the MLSS for a work permit.⁶

A total of 4 393 applications were received by the ministry, a decline of 35.7 per cent. Of this amount, 1 143 were new applications, a 64.4 per cent reduction, while the remainder (3 250) of applications were for renewal. The decline in work permit applications can be attributed to the pandemic and the attendant border closures nationally and internationally, as well as the general restrictions in global travel. China, which registered the highest number of applications in 2019, saw a decline of 47.1 per cent. Additionally, the scaling down of economic activity in the tourism sector as a consequence of the pandemic also

contributed to the fall in work permit applications. The ministry approved 80.4 per cent of all new work permit applications, while 87.2 per cent of applications for renewal were approved. Total approvals decreased by 43.3 per cent to 3 753, with males accounting for 82.8 per cent.

The data indicated that work permit approvals were concentrated mainly in the following industries: Wholesale and Retail Trade; Repair of Motor Vehicle and Equipment (1 414); Construction (899); Accommodation and Food Service Activities (468); and Other Service Activities (223). By occupation, the largest proportions of approvals were observed in the Professional (2 104); Technicians and Associate Professionals (942); and Crafts and Related Trade Workers (280) categories.

Overseas Employment Programme

The Overseas Employment Programme is the Government of Jamaica's (GOJ) main labour migration scheme. The Overseas Employment Programme places qualified Jamaicans in employment in the United States of America (USA) and Canada. The programme comprises the US Farm; the US Hospitality; the Canadian Farm & Factory Workers; the Canadian Skilled Worker/Hospitality; and the Canadian Low Skilled Worker programmes. The

5. Work permit data for 2020 is preliminary.

6. The law also requires documentation to be submitted to the MLSS showing the steps taken by organizations to employ Jamaicans with the requisite qualification, prior to hiring foreign nationals.

overall number of persons participating in the overseas employment programmes was 13 962, a 17.3 per cent decline compared with 2019 (Table 21.7). This decline was highlighted across all but one programme. Participation in the US programmes decreased by 25.8 per cent to 5 225, while participation in the Canadian programmes declined by 11.2 per cent to 8 737.

The US Hospitality programme recorded a 69.2 per cent reduction to 653, relative to 2019, while the number of participants in the US Farm programme declined by 7.1 per cent to 4 572. Males accounted for 92.1 per cent



of participants in the US programmes. Females, however, made up most of the participants in the US Hospitality programme (53.6 per cent). With their inclusion since

2017, a total of 66 females participated in the US Farm programme during the year.

Employment in the Canadian Farm/Factories Programme declined by 12.7 per cent to 8 071 persons while the Canadian Low Skilled Workers Programme increased by 10.6 per cent to 666 persons. Like 2019, there were no participants in the Canadian Skilled Workers Programme. The Canadian programmes continued to be dominated by males, who accounted for 94.1 per cent of participants. Both female and male participation in the Canadian programmes reduced by 31.1 per cent and 9.6 per cent, respectively.

In addition to the MLSS operated labour migration programmes, private employment agencies facilitate the placement of Jamaicans in employment overseas. These private operators are regulated by the MLSS under the Employment Agencies Regulation Act (1957). A total of 3 904 persons were placed in overseas employment: the H2B programme (2 186), Cruise Ship programme (200), the J1 programme (1 426), and the Canadian programme (92).

LABOUR MARKET INFORMATION

Labour market information is provided by several entities but the focus of this section will be on the work done by the Ministry of Labour & Social Security through the national Labour Market Information System (LMIS). The LMIS comprises the following:

- The Electronic Labour Exchange (ELE), which is the job matching component of the system.
- The Labour Market Intelligence section, which provides information on general and sectoral research and serves as a database for labour market information from a variety of sources.
- The Skills Bank, which is a repository of available skills in the country that serves to inform employers, investors and policymakers.

The ELE placed 786 jobseekers in employment locally,

TABLE 21.7
JAMAICANS EMPLOYED IN NORTH AMERICA UNDER THE OVERSEAS EMPLOYMENT PROGRAMME
BY SEX AND TYPE OF EMPLOYMENT, 2019–2020

	US Farm Work Programme		US Hospitality Programme		Canadian Farm & Factory Programme		Canadian Skilled Worker/ Hospitality Programme		Canadian Low Skilled Worker Programme		TOTAL	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
MALE	4 855	4 507	946	303	8 600	7 619	0	0	491	600	14 892	13 029
FEMALE	66	65	1 173	350	640	452	0	0	112	66	1 991	933
TOTAL	4 921	4 572	2 119	653	9 240	8 071	0	0	603	666	16 883	13 962

Source: Ministry of Labour and Social Security

with females accounting for 78.2 per cent of placements. Both sexes recorded decreases in placements—36.9 per cent and 49.4 per cent for males and females, respectively. Placement in industries such as Accommodation & Food Service Activities was affected by the pandemic and resulted in reduced placement generally. Increased promotion of the LMIS web and mobile application and a shift from in person to virtual platforms for the delivery of services resulted in the registration of some 897 jobseekers. To provide further support for various categories of jobseekers, the LMIS team targeted jobseekers who were more likely to have experienced job loss as a consequence of the pandemic and engaged in several partnerships with stakeholders to promote the LMIS and improve accessibility.

PRODUCTIVITY

The following analysis was provided by the Jamaica Productivity Centre using national accounts data from STATIN and covers the five-year period, 2015–2019.⁷ Labour productivity (defined as output per worker) is the measure used to determine the condition of a country's overall economy. Table 21.8A illustrates productivity performance over the five-year period, 2015–2019.

Labour productivity decreased annually at an average rate of 0.4 per cent. The decline for the five-year period reflected the employed labour force growing at an annual rate of 1.6 per cent, which was greater than the average annual growth (1.2 per cent) in real gross domestic product (GDP). While productivity over the period was on average declining, in 2018, labour productivity increased by 0.7 per cent. In 2019, labour productivity increased by 0.9 per cent. This increase was facilitated by positive, but weak, economic growth and a decrease in the growth rate of the employed labour force.

Over the period 2015–2019, capital productivity, defined as output per unit of capital stock, increased at an

average annual rate of 0.1 per cent. The increase over the period reflected a 1.0 per cent annual average increase in the capital stock as real GDP grew on average by 1.2 per cent. The increase in capital productivity over the period was stymied in part by a decline of 1.7 per cent in 2019. This was a reflection of capital stock growing more than twice the rate of GDP, which is an indication of increased investments in machinery and equipment.

Total Factor Productivity (TFP) is a residual measure that accounts for changes in output not caused by labour and capital, that is, it captures all the other factors that affect output. TFP over the period 2015–2019 declined by an average 0.1 per cent per year. In 2019, total factor productivity declined by 0.3 per cent. Factors such as workforce skills, quality of management, governance, the investment climate, among others, affected output negatively.

Unit Labour Cost (ULC), a measure of labour cost competitiveness, is defined as a ratio of real wage to labour productivity. ULC becomes less competitive when real wage grows faster than labour productivity and more competitive when labour productivity grows faster than real wage. Over the period 2015–2019, there was a 0.2 per cent average decline per year in unit labour cost. The decline over the period suggests a decrease in labour cost competitiveness. The ULC declined in 2019 and this was attributable to a decline in real compensation.

A summary of labour productivity growth rates by industry for the review period (2015–2019) is displayed in Table 21.8B. Over this review period, labour productivity in the Goods Producing industries declined by an average 0.1 per cent per year, while the Services Industries registered an increase in labour productivity of 0.6 per cent on average per year. The data indicated a decline in average annual labour productivity in the Goods Producing industries, reflected by average annual declines in Manufacturing (0.8 per cent), and Construction (4.8 per cent). The

TABLE 21.8A
GROWTH IN SELECTED TOTAL ECONOMY INDICATORS, 2015–2019

Year/Period	Value Added Gross Domestic Product (GDP)	Employed Labour Force (ELF)	Capital Stock	Real Wage Rate	Unit Labour Cost (ULC)	Value Added Output Per Worker	Capital Productivity	Total Factor Productivity (TFP)
2015	0.9	1.6	0.2	0.3	1	-0.7	0.7	-0.1
2016	1.7	2.9	0.3	-0.2	1	-1.2	1.4	0
2017	0.6	2.3	0.8	-1.3	0.3	-1.6	-0.2	-0.9
2018	1.9	1.2	1.3	2.0	1.3	0.7	0.3	0.7
2019	0.9	0.0	2.7	-3.8	-4.7	0.9	-1.7	-0.3
Average (2015–2019)	1.2	1.6	1.1	-0.6	-0.2	-0.4	0.1	-0.1

Source: Jamaica Productivity Centre

7. There is one-year lag in productivity data from the Jamaica Productivity Centre.

TABLE 21.8B
LABOUR PRODUCTIVITY GROWTH RATES BY INDUSTRY, 2015–2019

INDUSTRY	2015	2016	2017	2018	2019	Average (2015–2019)
Goods Producing Industries	1.5	4.2	-5	-1	-1.2	-0.1
Agriculture, Forestry and Fishing	2.5	15.1	-5.1	7.3	1.5	4.3
Mining and Quarrying	2.2	21.5	-14.6	-2.1	7.8	3.0
Manufacturing	6.3	-6.6	0	1.6	-5.3	-0.8
Construction	-5	-13.1	-0.5	-0.5	-0.6	-4.8
Services Industries	-2.5	8	-3.3	-0.7	1.6	0.6
Electricity & Water Supply	0.8	51.2	-3.4	-1.7	25.2	14.4
Wholesale & Retail Trade; Repair and Installation of Machinery	-0.9	-1.7	-1.5	-0.5	3.4	-0.2
Hotels and Restaurants	-8.6	-4.5	-0.9	-1.7	2.2	-2.7
Transport, Storage & Communication	4.8	1	-2.5	4.1	-2.5	1.9
Financial & Insurance Services	-1.6	12.6	-8	3	7.4	2.7
Real Estate, Renting & Business Activities	-11.5	-4.8	-4.1	-4.6	0.9	-4.8
Producers of Government Services	-0.7	1.9	-2.5	-3.5	1.5	-1.2

Source: Jamaica Productivity Centre

increase in labour productivity in the Services industries was supported by increased labour productivity in the Electricity & Water Supply industry, by 14.4 per cent; Transport, Storage & Communication industry, by 1.9 per cent; and the Finance & Insurance Services industry, by 2.7 per cent.

In 2019, the industries that registered growth in labour productivity were: Agriculture, Forestry and Fishing; Mining and Quarrying; Electricity & Water Supply; Wholesale & Retail Trade; Repair and Installation of Machinery; Hotels and Restaurants; Financial & Insurance Services; Real Estate, Renting & Business Activities; and Producers of Government Services.

Jamaica Productivity Centre

Improving the productivity levels of local firms and industries, as well as national productivity is the mandate, of the Jamaica Productivity Centre (JPC). Activities at the JPC focused on the following priority areas:

- promoting a national productivity-conscious culture
- providing research and advocacy for policies that will accelerate productivity growth, competitiveness and economic development
- providing high quality productivity audits, consulting and training in order to facilitate productivity improvement in public and private sector organizations
- ensuring success in sustaining productivity improvement.

During the year, productivity in Jamaica was affected by the COVID-19 pandemic and the measures implemented to curtail its spread. Following the onset of the pandemic, there was a decline in real value added and employment as demand weakened and supply chains were interrupted globally. Despite this, the JPC continued to assist entities

to improve the productivity of workers and processes by conducting productivity audits and assessments, as well as by developing other tailored activities, as part of its core strategic functions. The JPC conducted 29 consultations, four productivity audits and seven training/information sessions for public and private sector organizations. The JPC conducted a COVID-19 Impact Study to assess the experiences and measures taken by organizations, as well as the related outcomes. The initial findings suggest that of the respondents:

- 23.0 per cent of organizations have had to reduce their staff complement
- 70.0 per cent respondents noted a decrease in revenue or sales
- 96.0 per cent of organizations have implemented adjustments to their working arrangements.

OUTLOOK

The framework for a recovery programme for the labour market will be developed by the COVID-19 Labour Market Taskforce, which was established in late 2020. The taskforce is expected to submit a report with recommendations for addressing the impact of the pandemic on the labour market with a view towards building back better and stronger. Arising from recommendations outlined in the COVID-19 Economic Recovery Taskforce Report, a study to determine the feasibility of unemployment insurance in Jamaica will commence in early 2021. Economic conditions will continue to influence the performance of the labour market, as employment levels are expected to rebound in line with economic performance projections and the administration of the vaccine programme locally.

The MLSS will continue to strengthen its operations

with: the roll out of a new work permit portal; the facilitation of online work permit applications; further changes to customer service protocols to accommodate work permit applicants; and the upgrade of physical, and information and communication infrastructure in the Overseas Employment Department. The number of workers participating in the overseas employment programmes is projected to increase in 2021, as employment opportunities are also expected to improve in the Canadian market. A fallout in the US market is not anticipated, as antigen testing for workers travelling to the USA under the overseas employment programme was implemented in 2020. In response to the reduction in the number of persons trained

under the On-the-Job training programme and as part of its planned activities for the upcoming year, the ELE will implement a virtual on-the-job training programme to reach clients who are unable to participate physically. The ELE also intends to facilitate virtual job fairs to prepare jobseekers for the interview process; and carry out a social media campaign to market the LMIS and its services to jobseekers and employers.

Access to decent work will remain a priority for the government in the upcoming year and this will continue to guide labour market policy and programme development as efforts are made to strengthen labour market resilience. ■

HUMAN DEVELOPMENT, SOCIAL PROTECTION AND CULTURE

Education and Training

Health

National Security and Justice

Social Development, Social Protection and Culture

EDUCATION AND TRAINING

INTRODUCTION

The 2019/2020 Academic Year was one in which increasing access, improving quality and accountability at all levels of the education and training system were the main focus. Continued emphasis was placed on improving schools' infrastructure through renovation of buildings; enhancing the capacity of teachers through professional development and training; investing in textbooks and other resources; and providing inclusive education for vulnerable students. The execution of plans and 'normal' school sessions had to be halted as there was a sudden shift away from the classroom interaction as a result of the Coronavirus Disease 2019 (COVID-19) pandemic. This stemmed from the second half of the academic year being severely impacted by the COVID-19 pandemic resulting in the Government issued order for the physical closure of schools (face-to-face) in March 2020 and a move to virtual teaching and learning in an effort to curtail the spread of the virus. The Government issued decision to physically close schools was a temporary measure to slow the number of COVID-19 cases, however, as the effects of the pandemic continued, accommodations were made only for students sitting terminal examinations to briefly attend in-person school.

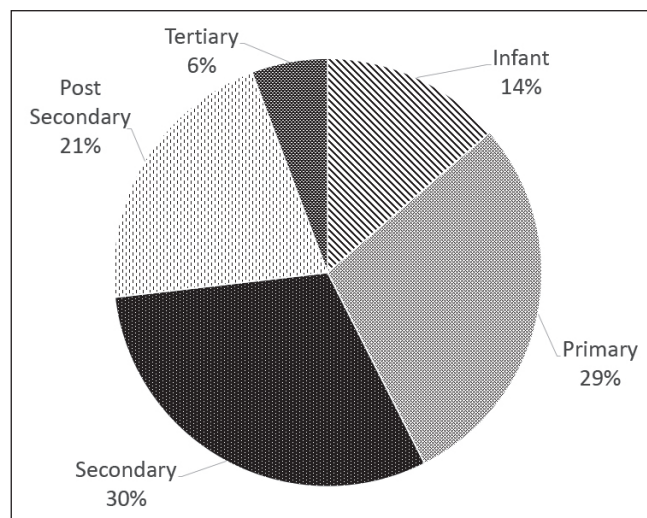


FIGURE 22A: ENROLMENT BY EDUCATION LEVEL (3–24 YEARS) 2019/2020

In light of the events brought on by the pandemic, responses by the Government were in line with continuation of education across all levels and the achievement of the goals of Vision 2030 Jamaica – National Development Plan for the creation of a world class education and training system. Supporting the goals articulated in Vision 2030 Jamaica – National Development Plan, is the National Education Strategic Plan (2011–2020) which aims to improve educational outcomes. Among the key elements of the Plan are Information and Communication Technology (ICT) and media in education, national literacy and numeracy, which played pivotal roles in the Ministry of Education, Youth and Information's (MOEYI) response to the pandemic. With the shift from face-to-face to online teaching and learning through numerous platforms, inequities in access to remote learning opportunities became visible. This prompted the Government, through the MOEYI, to provide grants and devices to educators and students. Collaboration with telecommunication companies and key stakeholders, which included International Development Partners (IDPs), played a crucial role in this effort for the continuation of education.

The work of the MOEYI was supported through its agencies as numerous programmes and institutions were accredited, training was provided to educators, and surveys were fielded to ascertain the impact of COVID-19 on higher education institutions. As it relates to training, the Human Employment and Resource Training /National Service Training Agency Trust (HEART/NSTA Trust) continued its effort to increase access, improve service delivery and the quality of output towards workforce development.

An estimated 671 739 persons in the school age-age cohort (3–24 years old) were enrolled in educational institutions with the highest enrollment at the Primary and Secondary levels, 29.0 and 30.0 per cent, respectively (Figure 22A). The total number of students enrolled at the pre-primary, primary and secondary level was 491 429.

Analysis of this chapter will be carried out on the Academic Year 2019/2020. However, some data were analysed using Fiscal Year (FY) 2020/2021 and others by calendar year 2020.

TABLE 22.1a
ESTIMATES OF EXPENDITURE BY FUNCTION AND PROGRAMMES, 2019/20–2020/2021

PROGRAMME	REVISED ESTIMATES			ESTIMATES		
	2019/20	2020/2021	TOTAL	2019/20	2020/2021	TOTAL
	RECURRENT	CAPITAL	TOTAL	RECURRENT	CAPITAL	TOTAL
Central Administration	1 400 212	638 686	2 038 898	1 389 698	70 000	1 459 698
Early Childhood Development	3 666 691	30 969	3 697 660	3 830 635	0	3 830 635
Primary Education	30 463 306	104 210	30 567 516	32 000 675	61 717	32 062 392
Special Education	1 395 409	21 000	1 416 409	1 357 023	143 000	5 500 023
Secondary Education	39 622 274	455 118	40 077 392	34 835 203	1 150 000	35 985 203
Tertiary Education	20 732 553	0	20 732 553	20 165 430	0	20 165 430
Adult Education	0	0	0	0	0	0
Core Educational Services	2 139 334	0	2 139 334	1 242 877	34 261	1 277 138
Library Services	1 271 832	0	1 271 832	1 239 725	0	1 239 725
Student Nutrition	6 541 847	0	6 541 847	6 873 365	0	6 873 365
TOTAL Education Budget	107 233 458	1 249 983	108 483 441	102 934 631	1 458 978	108 393 609
Broadcasting and Publishing Services	201 562	0	201 562	178 049	0	178 049
Family and Children Services	16 220	0	16 220	36 717	0	36 717
Youth Development Services	174 399	0	174 399	232 178	0	232 178
TOTAL MOEYI BUDGET	107 625 639	0	108 875 622	103 381 575	1 458 978	108 840 553
Less Appropriations in Aid	1 325 890	0	1 325 890	890 000	0	890 000
NET TOTAL MOEYI BUDGET	106 299 749	1 249 983	107 549 732	102 491 575	1 458 978	107 950 553

Note: Allocations for nutrition are distributed across all levels from early childhood to secondary.

Source: Estimates of Expenditure, 2020/21

FINANCE

The education sector is largely financed by the Government of Jamaica (GOJ) allocations, as well as contributions from the private sector, households, IDPs and faith-based organisations. Household contributions were in the form of cost sharing at the tertiary level and payment inputs for other education-related items across the education levels. For the 2020/2021 FY, GOJ allocation totalled \$107.9 billion representing 12.7 per cent of the national budget and a 0.4 per cent increase over the previous period (Table 22.1A). Approximately \$102.5 billion of GOJ allocation was for recurrent expenditure, representing a decrease of 3.6 per cent compared with the previous year.

Of the overall education budget, allocations by education level were 33.2 per cent for secondary, 29.6 per cent for primary, 18.6 per cent for tertiary, 5.1 per cent Special Education and 3.5 per cent for Early Childhood Development. The Ministry increased allocations for Youth Development and Family and Child services by 33.1 per cent to \$232.2 million and 126.4 per cent to \$36.7 million, respectively (Table 22.1A). The annual per capita expenditure in education was \$391 600.0 at the tertiary level, \$185 811.0 at the secondary level; \$153 935.0 at the primary level; \$40 073.0 at the early childhood level; and \$458 601.0 for Special Education (Table 22.1B). With the

exception of technical high and vocational/agricultural high schools, per capita expenditure increased across all education levels with increases ranging from 5.6 per cent at the secondary level to 39.8 per cent at the Special Education level.

For the FY 2019/2020, Government allocation to the capital budget was \$1.5 billion, however, overall capital expenditure (multilateral and bilateral projects) amounted to \$1.2 billion. Reduction in the amount spent may be due to the effects of the COVID-19 pandemic which resulted in funds being diverted. The largest allocations went to four projects—Education Transformation Programme, 30.0 per cent; Education System Transformation Programme, 27.0 per cent and 11.0 per cent each to Establishment of Diagnostic Centre and Partnerships for Improves Safety and Security in Schools (Figure 22.B).

The **Students' Loan Bureau (SLB)** continued to support tertiary education through its revolving fund, which provides loans to qualified Jamaican students for tuition at local and overseas tertiary institutions approved by the MOEYI. Grants are also made by the Bureau to loan beneficiaries who require additional support. For the 2019/2020 Academic Year, the Bureau received 13 601 applications of which, 98.6 per cent was approved. Loan amounts of over \$4.0 billion were disbursed, an increase of 26.4 per cent. By loan type, \$3.8 billion went to undergraduate tuition, \$194.0 million

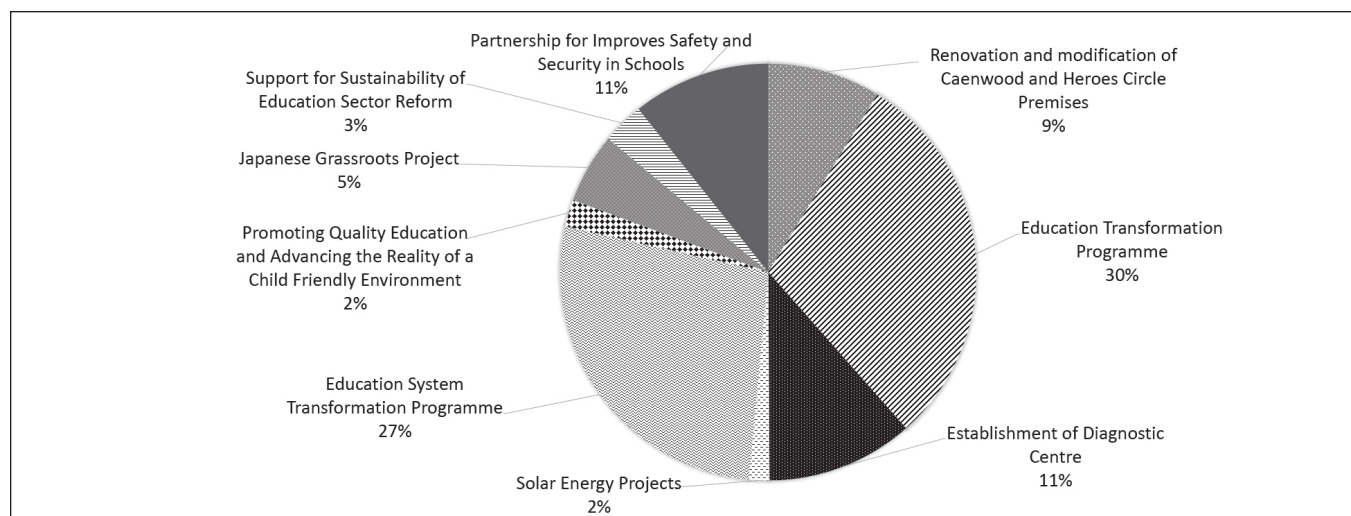


FIGURE 22B: CAPITAL EXPENDITURE (MULTILATERAL/BILATERAL PROGRAMMES) FY 2019/2020

TABLE 22.1b
MINISTRY OF EDUCATION
PER CAPITA EXPENDITURE BY EDUCATIONAL LEVEL, 2017/2018–2019/2020
(\$ CURRENT PRICES)

LEVELS	2017/2018 REVISED ESTIMATES	2018/2019 REVISED ESTIMATES	2019/2020 REVISED ESTIMATES
Early Childhood:			
Recognized Basic Infant	21 190	24 525	26 150
Average Early Childhood	81 896	85 405	87 044
	31 258	36 707	40 073
Primary:			
Primary	120 163	126 930	138 224
Grades 1–6 of All-Age, Primary & Junior High, and Primary	126 943	182 223	222 523
Average Primary	129 169	138 345	153 935
Special Education	321 284	327 947	458 601
Secondary:			
High Schools	165 714	173 691	184 208
Technical High	152 970	158 049	157 540
Vocational/Agricultural	315 603	251 155	177 032
Grades 7–9 all of All-Age, Primary & Junior High	345 868	692 448	789 614
Average Secondary Education	165 443	175 969	185 811
Tertiary:			
The University of the West Indies			
University of Technology, Jamaica	430 306	390 043	430 544
Teachers' Colleges	398 169	409 416	427 054
College of Agriculture, Science and Education	512 840	389 872	453 490
Edna Manley College of the Visual and Performing Arts			
Community College	262 983	240 841	265 710
Moneague College			
Bethlehem Community College			
GC Foster College	445 038	323 341	362 726
Average Tertiary Education	386 354	353 664	391 600

Note: Average per capita figure for each level includes administration, supervision and other costs.

Enrolment figures for Tertiary Education are prorated because of differences between the Financial Year and the Academic Year.

Source: Ministry of Education, Youth and Information

TABLE 22.2
STUDENTS' LOAN BUREAU
GRANTS BY INSTITUTION, 2019/2020

Institution	Amount \$
UWI Mona	53 250 000.00
University of Technology	34 400 000.00
Teachers School	9 100 000.00
Northern Caribbean University	24 475 000.00
Community College	7 500 000.00
Foreign Schools	325 000.00
Other	30 925 000.00
Total	159 975 000.00

Source: Students' Loan Bureau

to PAYS¹ tuition and \$49.0 million to postgraduate tuition. Overall, disbursement of grants totalled \$160.0 million, a reduction of 10.2 per cent. By institution, The University of the West Indies (UWI) Mona (\$53.3 million) and the University of Technology, Jamaica (UTech, Jamaica) (\$34.4 million) received the largest amount in grants (Table 22.2).

During Fiscal Year 2019/2020, the **Human Employment and Resource Training /National Service Training Agency Trust (HEART/NSTA Trust)** received employers' contribution amounting to \$14.0 billion from 14 654 employers,² an increase of 11.3 per cent compared with the previous year. This comprised approximately 92.2 per cent of total income, which was \$15.2 billion. Training initiatives in support of the national human capital development mandate were made possible through a total expenditure of \$14.5 billion.

The **Jamaica Social Investment Fund (JSIF)** expended \$216.0 million on educational infrastructure during July 2019 and June 2020. These projects were funded by the European Union Poverty Reduction Programme IV (EUPRP IV), and the World Bank's Integrated Community Development Project (ICDP), among others. Rehabilitation work was carried out on 15 primary schools in five parishes which benefited over 7 000 persons. Over 6 700 persons benefited from completed rehabilitations to 14 primary schools through ICDP support. Funds received from the EUPRP IV aided the completion of one sub-project, which benefited 329 persons. In response to the mandated protocols, provision in the form of personal protective

equipment (PPE), sanitation and training were provided to specific schools which benefited over 8 000 persons.

Private sector partners such as the Digicel Foundation, continued to play a critical role in providing financial assistance to the education sector following the physical closure of schools in response to curtailing the spread of the COVID-19 virus. The Foundation provided support through a number of initiatives—1 300 tablets were supplied to the Jamaica Council for Persons with Disabilities and the MOEYI; and 2 000 SIM cards equipped with education plan and 10GB monthly data were donated valued at \$96.0 million.

The Foundation collaborated with several partners on external tablet programmes to provide mobile and MiFi devices to students. The following partnership initiatives were undertaken:

- Sandals Foundation – Lesson Alive: donation was in the form of an estimated \$2.0 million in SIM Cards, each with two months free of Education Data Plan; 50 modems and 50 tablets
- Seprod Foundation – ConnectED JA Fund: an estimated \$800 000.0 in SIM Cards, each with two months free Education Data Plan
- Support to 10 Special Needs Schools: provided 100 tablets; and 100 SIM Cards, each with two months free Education Data Plan.

The Foundation provided construction support to:

- Renovation of Green Pond Infant School: an estimated \$21.7 million was invested to aid with construction with a direct impact of 250 students. This move was to ensure that schools are Early Childhood Commission certified
- ALPHA School of Music: an investment of \$39.9 million aimed at creating an inclusive school for music in Jamaica. An estimated 100 students were directly impacted
- The special needs community: the Pear Tree River School received \$37.0 million in investment towards renovation. Renovation was carried out to accommodate the additional special needs students who could no longer be accommodated at the Lyssons facility. An estimated 80 students were directly impacted.

1. Pay As You Study (PAYS) is a rebranded and restructured loan type of the Parent Plus loan facility. It is offered to a selected number of students/borrowers and it specifically targets employed students or anyone (parent, guardian, or spouse), who is employed and willing to stand as the principal borrower.
2. Employers' contributions are recognised as income when received by the Trust from Tax Administration of Jamaica, as mandated by the HEART Act. Employers become eligible to pay HEART contributions when their total gross emoluments (wage bill) exceed \$14 444.00. Each month, eligible employers contribute to the Heart Trust Fund 3.0 per cent of the total amount of monthly emoluments paid to employees.

ADMINISTRATION

The GOJ, through the MOEYI and its agencies, continued its thrust to improve the quality of the sector by providing training to strengthen the teaching profession; developing and implementing policies; and creating programmes aimed at fostering a safe and secure school environment. Additionally, these agencies ensure that institutions are operating within the established guidelines and are maintaining quality national and global standards. Major activities undertaken by the respective agencies are highlighted below:

The Jamaica Teaching Council (JTC) was established as part of the education transformation strategy to improve the quality and coverage of education islandwide. The JTC is responsible for the Professional Development of Teachers including: recognition and awards; Registration of Teachers; the Master Teacher Programme; Teacher Mentorship; and the Appeals Tribunal. The following activities were carried out by the JTC during September 2019 to December 2020:

- Navigating Online Like a Pro (Parts I and II) – 21 840 teachers were engaged in multiple sessions using four Learning Management Systems (LMS) aimed at empowering them to transition from a physical to a virtual classroom. Teachers were exposed to the use of 20 online tools for student engagement that could be employed within a LMS.
- Master Teacher Assessment – identifies and assesses teachers as Master Teachers. Fifty-two portfolios for applicants were received and assessed, of which 18 candidates were shortlisted and seven were recommended for designation as Master Teachers
- OAS/ITEN³ Massive Open Online Course (MOOC) – a partnership with the Inter-American Teacher Education Network of the OAS which offers a MOOC to existing and potential Master Teachers. Training was offered to 5 000 teachers
- National Environment and Planning Agency (NEPA) Junior Environment Programme – 688 teachers at the Grades 4–6 level were exposed to the Social Studies and Science objectives which relates to the environmental science in the National Standards Curriculum (NSC).

National Council on Education (NCE) – the NCE was established to ensure coherence, consistency and consensus in the development and implementation of educational policies. Major activities undertaken by the agency during the review period included:

- A comprehensive research commenced to assess

the impact of the COVID-19 pandemic on the education system, with special focus on the primary and secondary levels. A total of 19 000 respondents participated in the survey. The following output of the research were achieved:

- A protocol document for best practices in response to the COVID-19 pandemic
 - Modelling options for the Jamaican school system
 - Early Childhood Sector Report on the consultations held with the Early Childhood Development Sector
 - The preparation of a concept note entitled “Vaccinate School Employees: Strengthening our Resolve to Return to face-to-face Schooling”
 - Policy brief on the Hosting of the Caribbean Secondary Education Certificate (CSEC).
- School Governance – focus was placed mainly on the appointment of school boards. The number of new school boards appointed included 124 in Region 6, 110 in Region 7, and 10 in Region 1.

National College for Educational Leadership (NCEL) – its main function and responsibility is to develop excellent leadership in public schools and supporting institutions. Strategic initiatives were aimed at improving leadership as well as developing activities for supporting aspiring and experienced school principals. Major activities included:

- The design and delivery of a virtual instructional learning course in partnership with UNICEF⁴ to strengthen digital literacy among school leaders and support principals management and supervision of teachers using e-learning platforms. A total of 1 319 educators were reached
- The development of the 3R Framework for School Leaders: Regroup, Recondition and Rebuild – this course was developed in response to the health and safety protocols that were observed for the reopening of schools in October 2020. As at September 2020, a total of 800 principals/school administrators, from both public and private institutions, have accessed the 3R Framework
- The delivery of the Child-Friendly Schools Leadership Online Course – designed in partnership with UNICEF, the course equipped school leaders with principles required to lead a safe, secure and child friendly institution. A total of 615 participants, from both public and private institutions were trained

3. Organization of American States/ Inter-American Teacher Education Network

4. United Nations Children Education Fund (UNICEF)

- Leadership Development Webinars – the agency hosted three webinars:
 - Avoiding Burn Out: Guilt Free Self-Care in Times of Crisis
 - Maslow before Bloom: Practical Strategies for Leading with Care
 - Leadership and Resilience: Effectively Navigating Challenges and Times of Adversity.

The **Jamaica Tertiary Education Commission (J-TEC)** is the county’s regulatory and supervisory body for the tertiary sector. Major activities carried out by the agency included:

- Registration of Institutions – The Standards, Regulation and Institutional Support Division was tasked with the directive to develop a registration system that would ensure the compliance of institutions to established standards within the tertiary sector. A total of four institutions were registered with the agency while three were inspected
- National Student Satisfaction Survey 2020 – over the months of January to April 2020, the National Student Satisfaction Survey was administered. The survey was intended to facilitate institutional strengthening and support aimed at improving undergraduate student experiences across public and private universities and colleges in Jamaica. A total of 991 students across the five participating institutions⁵ responded
- The fielding of two surveys on “the Impact of COVID-19 on Higher Education Institutions” – a student survey and a local private and public tertiary institutions survey from April to May. A total of 600 students responded to the student survey. The findings from that survey showed that 95.0 per cent of students were engaged in virtual learning, 18.0 per cent indicated the likelihood of not enrolling in the upcoming academic year (2020/2021) and 27.0 per cent indicated inconsistent access to a computer or laptop. Internet connectivity was the most pressing challenge noted by institutions. The tertiary institutions survey captured data from nine public and private higher education institutions. The survey findings indicated inadequate infrastructure to conduct virtual teaching and learning as their major challenge
- Continuation of the Stakeholder Information Databases – Two databases—the Programme Tuition Fee (PTF) database and the Scholarship database—were created to provide timely information to students starting higher education. Information surrounding

programmes of study including costs, and length/duration can be found on the PTF database. Modality and qualification awarded are also available on this database. The Scholarship database provides information on scholarships and other financing options. This database boasts over 150 scholarship entries with an estimated value of over \$50.0 million

- Increasing Student Awareness – over 4 000 participants attended a series of webinars hosted by the J-TEC. The youth-focused online sessions looked at issues relating to Financing Higher Education, College Preparation, and Career & Earning Opportunities. The Commission delivered webinars under the #GoHigher with the objective of building student awareness of available opportunities to improve themselves academically and professionally.

The **University Council of Jamaica (UCJ)** continued to execute its mandate to assure quality in the Jamaican higher education sector through the quality assurance processes of Registration of Institutions and Accreditation of Programmes and Institutions. During the academic year 2019/2020, the UCJ visited 12 institutions to review 31 programmes for accreditation. The Council accredited 45 programmes (15 new and 30 re-accredited). Accreditation by level included one doctoral degree; seven master’s degrees; 19 bachelor degrees; 15 associate degrees; and three short courses. Five institutions submitted applications for registration and were awarded Candidacy for Registration. The programme offerings at these institutions were mainly of the professional type as well as technical and vocational training.

As of March 31, 2020, there were 76 institutions registered with the UCJ. Of this total, four are universities, 31 are the Accredited Training Organizations (ATOs) that offer NVQ-J certification programmes, and 41 are other institutions comprising colleges, institutes and training units. Additionally, the Council under its authority conferred degrees on 62 students from the Vocational Technical Development Institute (VTDI).

The UCJ represented Jamaica in a global study conducted by the International Institute for Educational Planning (IIEP-UNESCO) on flexible learning pathways in higher education. The focus of the study was to provide evidenced-based information toward strengthening learning pathways as an area of reform for the higher education system.

The strategic objectives and priorities articulated in the Medium-Term Socio-Economic Policy Framework (MTF) 2018–2021 were advanced by a number of projects

5. The participating institutions were Shortwood Teachers’ College; Edna Manley College of the Performing Arts; The University of the West Indies, Mona; University of Technology, Jamaica; and the Caribbean Maritime University.

executed through IDP support. The sector benefited from \$71.6 million under the Japan Funded Inter-American Development Bank (IDB) Technical Corporation (TTC) Project—Education Sector Transformation Plan Learning and Teaching. The project focused on three fundamental components of the education sector—early childhood development, teacher training institutions and governance of school services. Achievements under the project included the:

- development of the quality assurance standards for the teacher training institutions
- implementation of Phase I of the Alternative Programme for Exceptional Learners (APEX)
- development of the National School Leaving Certificate mobile application (see chapter on Official Development Assistance).

Approximately \$10.0 million was expended by UNICEF under the Public Expenditure Review – Education Sector Project. Objectives under this project included assessing the state of knowledge on learning outcomes in Jamaica, the efficiency of public spending and resource allocation in the education sector, and opportunities for optimization. As at December 2020, UNICEF Jamaica spearheaded the coordination and implementation of the Public Expenditure Review (PER) of the education sector in collaboration with the World Bank (see chapter on Official Development Assistance).

PERFORMANCE

Formal education is provided by the GOJ and private entities. The education system consists of four levels: early childhood, primary, secondary and tertiary. Public and private schools exist at all four levels of the education system. For the different education levels, focus will be placed on overall enrolment, major examinations, research and other activities. Throughout the different levels, a variety of examinations is offered to students including selection/placement and terminal certification examinations.

SPECIAL EDUCATION

Special Education is provided for special needs students in the age group 4–18 years. Approximately 2 349 students were enrolled in government-owned and government aided special schools and units. Educators totalled 488 (98.9 per cent female).

The Special Education Unit continued to work towards

the development, expansion and transformation of special education programmes and services. In keeping with Government commitment for inclusive education for all, the following support was given to the Unit:

- salary support in the amount of \$85.0 million to 18 non-government organizations/community-based programmes. Offerings from these programmes included educational, rehabilitation and therapeutic services for children with diverse disabling conditions
- partnership through a Memorandum of Understanding was developed with several independent schools in response to inadequate space in Government institutions. This resulted in 151 special needs students being placed in private facilities
- Primary Exit Profile Accommodations – examination accommodation applications were supported by a psychoeducational assessment report for students with special needs. Approximately 32 assessment reports were reviewed for Grade 4; 86 for Grade 5; and 157 for Grade 6 students. A total of 275 assessment reports were reviewed and recommendations made for examination accommodations.

Capacity building activities carried out included:

- remote training was provided to 180 Special Education teachers
- training sessions in the provision of personal care, mobility, writing, feeding and behavioural support to students with special needs in mainstream settings. Approximately 136 caregivers/shadows benefited
- a forum was held aimed at presenting strategies for engaging children with special needs during remote learning. A total of 500 parents benefited
- production of material in braille and large print – approximately 390 braille copies of ‘When Disasters Strikes’ were reproduced for the Combined Disabilities Association. Students sitting the Grade 6 PEP Ability Test benefited from the national examinations being reproduced in braille and large print formats
- training was conducted for 30 master trainers under the implementation of the Alternative Programme for Exceptional Learners (APEX).⁶
- Special Education Policy – based on feedback received from Cabinet Office regarding the draft policy and no objection letters received from the Ministry of Health and Wellness and the Ministry of Labour and Social Security, the revised policy will be resubmitted to Cabinet Office for approval.

6. APEX was developed to guide the provision of services for students who are gifted and talented. Students will be engaged through a programme at the school level that is based on a model of acceleration or enrichment. Acceleration involves students having access to higher grade level content while enrichment involves a greater depth of content at the same grade level.

TABLE 22.3
ENROLMENT IN EARLY CHILDHOOD EDUCATION BY SCHOOL TYPE AND YEAR, 2015/16–2019/2020

YEAR	Infant School		Infant Department		Basic School		Kindergarten		TOTAL	
	No.	Enrolment	No.	Enrolment	No.	Enrolment	No.	Enrolment	No.	Enrolment
2015/16	41	8 382	260	10 402	2 086	73 738	130	18 281	431	110 803
2016/17	41	7 698	282	10 838	2 702	93 493	247	22 405	3 272	134 434
2017/18	41	7 393	318	11 356	1 701	76 229	251	5 968	2 311	100 946
2018/19	47	7 035	344	12 262	1 673	69 720	143	6 037	2 207	95 054
2019/2020	54	7 431	382	14 651	1 651	69 720			2 087	91 802

Source: Statistics Section, Ministry of Education, Youth & Information and Early Childhood Commission Registration Information System

EARLY CHILDHOOD DEVELOPMENT (ECD)

The ECD programmes target children 0–8 years. The programmes were offered in an estimated 2 085 Basic/Infant Schools and Departments and Kindergarten Departments of preparatory schools for children 3–5 years. Available data estimated that a total of 91 802 students in this cohort were enrolled in early childhood institutions (Table 22.3). Data from the Jamaica Survey of Living Conditions (JSLC) 2018 indicated that gross enrolment was 99.1 per cent and net enrolment was 95.3 per cent.

PRIMARY EDUCATION

Education at this level is offered to children aged 6–11 years in Grades 1–6 of public Primary, All-Age and Primary & Junior High Schools. Enrolment at this level was 193 876 (51.0 per cent male) (Table 22.4). Findings from the JSLC 2018 indicated that gross enrolment was 99.9 per cent and net enrolment was 89.4 per cent. The total number of teachers at this level was 11 625 (88.3 per cent female).

Grade One Individual Learning Profile (GOILP) – each academic year, the GOILP is administered between August and September. This assessment enables teachers in determining the performance level of students entering Grade 1. The assessment results are then entered for each student in the National Student Registration System. The Grade One Individual Learning Profile (GOILP) consists of six sub-tests: General Knowledge; Number Concepts; Oral Language; Reading; Writing and Drawing; and Work Habits and Classroom Behaviour.

The 2019/2020 administration of the GOILP had 28 545 valid assessment records being submitted to the National

Student Registration System. Disaggregated by sex, the data indicated that 14 415 students were males, 14 111 females and 19 students for which sex was not reported. The highest proficiency observed was Number Concepts, 80.0 per cent. At the other end, General Knowledge had the lowest level of proficiency, 58.0 per cent.

Primary Exit Profile (PEP)

The COVID-19 pandemic disrupted the administration of the PEP Grade Six Performance Task and Curriculum-Based Test. The assessment for the examination was truncated to the use of components from Grades Four and Five only.⁷ Instead, a modified psychometrically approved assessment profile for students matriculating to high school was executed. The number of students registered to sit the examination was 39 689 (20 157 males). Of registered students, 97.8 per cent sat the exam, 2.0 per cent were absent while less than 1.0 per cent were excluded (Table 22.5A).

All eligible students were placed in high schools. Of all eligible students, 80.0 per cent were placed in their preferred schools, 16.0 per cent in high schools in proximity to schools they were attending and 4.0 per cent manually placed in secondary level schools in proximity to the address they submitted. Over 7 400 Programme of Advancement Through Health and Education (PATH) beneficiaries sat PEP examinations (Box 1).

Based on the procedures and applications outlined by the National Standards Curriculum (NSC), students' skills and competencies were assessed based on their performance in four subjects—Mathematics, Language Arts, Science and Social Studies. Each subject has a corresponding range of

7. Computation of the placement scores for PEP 2020 comprised seven tests: Grade 4 literacy; Grade 4 numeracy; Grade 5 PEP performance task, mathematics; Grade 5 performance task, science; Grade 5 PEP performance task, social studies; Grade 5 PEP performance task, language arts; and Grade 6 abilities test.

TABLE 22.4
PRIMARY LEVEL STUDENT ENROLMENT BY TYPE OF SCHOOL, 2016/17–2019/2020

	2016/17			2017/18			2018/19			2019/2020		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Primary (Grade 1–6)	88 374	85 385	173 759	85 779	85 820	168 599	82 596	79 393	161 989	81 261	79 047	160 308
All Age (Grades 1–6)	10 272	9 206	19 478	9 848	8 791	18 639	9 280	8 339	17 619	7 155	6 596	13 751
Prim & Junior High (Grades 1–6)	14 269	12 917	27 186	13 670	12 414	26 084	12 559	11 343	23 902	10 406	9 411	19 817
Sub Total	112 915	107 508	220 423	109 297	104 025	213 322	104 435	99 075	203 510	98 822	95 054	193 876
Preparatory	10 756	10 857	21 613	11 439	11 398	22 837	12 099	12 056	24 155			
Total	123 671	118 365	242 036	120 736	115 423	236 159	116 534	111 131	227 665	98 822	95 054	193 876

Note: Estimated, Jamaica Survey of Living Conditions 2015–2017

Source: Statistics Section, Ministry of Education, Youth and Information

BOX 1:
PATH STUDENTS PEP PERFORMANCE, 2020

PATH students sitting PEP totalled 7 463 students (3 767 females). Students were placed according to the following categories:

School of choice, 6 231 students (83.0 per cent)

- proximity, 894 (12.0 per cent)
- manually placed, 30.3 (4.0 per cent)
- twinning placement method, 35 (< 1 per cent)

Of the total number of male beneficiaries placed:

- 3 056 (81.0 per cent) received placement by school preference
- 446 (12.0 per cent) received secondary placement
- 247 (7.0 per cent) were manually placed
- twinning placement method, 18 (< 1 per cent)

Of the female beneficiaries:

- 3 175 (86.0 per cent) were placed by school preference
- 448 (12.0 per cent) received secondary placement
- 56 (2.0 per cent) were manually placed
- twinning placement method, 17 (< 1 per cent)

scores based on scaled scores⁸ derived from the students' raw scores. Following the scaled scores for each subject, students' performance is then placed in four categories/achievement levels: Beginning,⁹ Developing,¹⁰ Proficient¹¹ and Highly Proficient.¹²

Student performance in the four subject areas showed that less than 25.0 per cent performed at the Beginning level—Social Studies 24.0 per cent, Science 22.0 per cent, Language Arts 15.0 per cent and Mathematics 10.0 per cent. Performance within the Highly Proficient category showed that student performance was under 10.0 per cent—Mathematics 9.0 per cent, Science 7.0 per cent, Language Arts 5.0 per cent and Social Studies 3.0 per cent. At the Developing level, student performance were 41.0 per cent, Mathematics; 33.0 per cent Science; and 23.0 per cent and 25.0 per cent in Social Studies and Language Arts, respectively. Performance at the Proficient level showed students obtaining passes of 55.0 per cent and 50.0 per cent in Language Arts and Social Studies, respectively (Table 22.5B).

- Scaled scores** are derived by taking the number of questions the student answered correctly on each test, then converting these to a common scale that range from 200–400. The scaled scores are directly aligned to achievement level descriptors (beginning, developing, proficient and highly proficient), which detail how well a student has achieved the required knowledge, skills and competencies as outlined in the NSC for each subject.
- Beginning** – Students at this level demonstrate limited or no evidence of the required competence necessary at Grade 6, as specified in the National Standards Curriculum (NSC). These students will need intensive on-going academic support at Grade 7.
- Developing** – Students at this level demonstrate partial evidence of the required competence necessary at Grade 6 level, as specified in the National Standards Curriculum (NSC). These students will need targeted academic support at Grade 7.
- Proficient** – Student at this level demonstrate adequate evidence of the required competence necessary at Grade 6, as specified in the National Standards Curriculum (NSC). These students *may* need minimal academic support and/or extended learning activities at Grade 7.
- Highly Proficient** – Students at this level demonstrate an advanced level of competence necessary at Grade 6, as specified in the National Standards Curriculum (NSC). They *may* need extended learning activities at Grade 7.

TABLE 22.5a
PRIMARY EXIT PROFILE STATISTICAL SUMMARIES, 2018/19–2019/2020

	PEP 2019			PEP 2020		
	Male	Female	Total	Male	Female	Total
Registration Statistics						
Number registered	21 603	19 945	41 548	20 158	19 531	39 689
Number absent	626	496	1 122	511	375	886
Number sitting	20 977	19 449	40 426	19 647	19 156	38 803
Placement Method						
Preference Placement	15 885	16 261	32 146	15 185	15 816	31 001
Secondary Placement	2 999	2 897	5 896	3 136	3 004	6 140
Manual Placement	2 079	285	2 364	1 343	288	1 631
Excluded	11	6	20	10	13	23
School Type Placement						
In High Schools	20 890	19 373	40 263	19 261	18 903	38 164
In Junior High Schools	61	62	123	461	268	729
In Special Needs Schools	12	8	20	14	11	25

Source: Ministry of Education Youth & Information

TABLE 22.5b
STUDENT ACHIEVEMENT IN THE VARIOUS SUBJECT AREAS, 2019/2020

Tests	Beginning % of Students	Number of Students	Developing % of Students	Number of Students	Proficient % of Students	Number of Students	Highly Proficient % of Students	Number of Students
Mathematics	10	3 858	41	16 273	40	15 640	9	3 651
Science	22	8 787	33	12 968	38	14 931	7	2 860
Social Studies	24	9 423	23	8 786	50	19 576	3	1 106
Language Arts	15	6 257	25	9 781	55	21 625	5	1 843

Source: Examinations Administration and Assessment Unit - Ministry of Education, Youth and Information

SECONDARY EDUCATION

At this level, education is provided to students aged 12–16/18 years from Grades 7–11/13. Enrolled at this level were 205 751 students (50.3 per cent female) in four types of public secondary level institutions (Table 22.6).¹³ The total number of teachers employed at this level was 12 987 (72.2 per cent female).

The Alternative Pathway to Secondary Education (APSE) Programme was introduced in 2016 to engage students to remain in school for an additional two years. Students who would have completed at age 16 years and up to Grade 11 are accommodated until age 18 years and up to Grade 13. The first five years cover Grades 7–11 of schooling with an additional two years, Grades 12–13, at the sixth-form level. At the end of the five-year programme,

students sit the Caribbean Secondary Education Certificate (CSEC) Examination while at the end of each year of the two-year programme students sit the Caribbean Advance Proficiency Examination (CAPE), Units I and II.

Caribbean Secondary Education Certificate (CSEC) Examination

Registration to sit the examination totalled 33 139 students from public schools. Of those registered, 97.6 per cent sat with 92.8 per cent obtaining Grades 1–3. Of candidates entered, 56.1 per cent were females. Approximately 98.3 per cent of registered females sat the examination with 94.3 per cent awarded Grades 1–3. A total of 96.7 per cent males sat the examination with 90.9 per cent obtaining Grades 1–3.

13. Four types of public secondary schools: All-Age (Grades 7–9), Primary and Junior High (Grades 7–9/11), Secondary High and, Technical High.

TABLE 22.6
SECONDARY LEVEL STUDENT ENROLMENT BY SCHOOL TYPE, 2017/2018–2019/2020

	2017/18			2018/19			2019/2020		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
All Age (Grades 7–9)	165	50	215	100	25	125	0	0	0
Junior High/Prim. & Junior High (Grades 7–11)	1 867	1 185	3 052	769	487	1 256	929	585	1 514
Secondary High	90 956	95 349	186 305	90 495	93 758	184 253	90 905	93 041	183 946
Technical High	10 136	9 506	19 642	10 436	9 831	20 267	10 411	9 880	20 291
TOTAL	106 031	108 012	214 043	105 276	106 507	211 783	102 245	103 506	205 751

Source: Policy Analysis, Research and Statistics - Ministry of Education, Youth and Information

Performance¹⁴

Regional examinations administered by the Caribbean Examination Council (CXC) were pushed back due to the effects of the COVID-19 pandemic. Examinations were scheduled between July 13 and August 04, 2020. In response to the pandemic, CXC used a modified version of its assessment which included the administration of Paper 01 and School-Based Assessment (SBA)/Paper 03 supported by appropriate modelling and teachers' predictive grades.¹⁵

Improved pass rates were observed in 20 of the 34 subjects sat. There were 180 157 subject entries for the 2020 CSEC examination, of which, 97.5 per cent sat. Of the numbers sat, 78.2 per cent were awarded Grades 1–3. There were seven subjects with average pass rates of over 90.0 per cent (Table 22.7). Subject entries by sex revealed that 73 759 were males with 71 113 sitting exams and 53 198 scored Grades 1–3. Subject entries for females was at 106 398 with 104 542 sitting exams and 84 205 scored the required grades. Males outperformed females in six of the 34 subjects sat—Caribbean History, Economics, French, Music, Principles of Accounts and Theatre Arts.

Business-related subjects had an average pass rate of 89.6 per cent. Principle of Business had the highest pass rate of 93.8 per cent followed by Office Administration 91.1 per cent. Improvements were observed in pass rate for all the business-related subjects. The largest increase in pass rate was recorded for Principles of Accounts, moving to 86.2 per cent from 77.5 per cent. The Arts-related subjects showed an increase in pass rates across all subjects with the exception of Spanish which moved to 67.4 per cent from 69.3 per cent. The largest increase in pass rate was attributed to English B which moved to 80.7 per cent from 68.8 per cent.

Noticeable decreases were observed in some Science-related subjects—Additional Mathematics (6.7 percentage

points), Chemistry (3.2 percentage points) and Human and Social Biology (0.5 percentage points). Technical/Vocational-related subjects recorded decreases in pass rates in 10 of 14 subjects. The largest decreases were observed in Theatre Arts and Visual Arts, 14.2 and 5.9 percentage points, respectively. Theatre Arts moved to 70.1 per cent from 84.3 per cent and Visual Arts to 67.5 per cent from 73.4 per cent. The subject with the largest increase was Electronic Document Preparation Management, moving to 96.6 per cent from 85.9 per cent.

Pass rates of 61.2 per cent and 85.1 per cent were recorded for Mathematics and English Language, respectively. These represent increases in pass rates over the previous year of 6.6 percentage points for Mathematics and 2.3 percentage points for English Language.

Caribbean Advance Proficiency Examination (CAPE)

Candidates were entered for 35 subjects in the July 2020 sitting of CAPE. Subject entries for Units I and II totalled 60 434. Of the overall subject entries, 57 727 (96.0 per cent) sat with an average pass rate of 91.0 per cent. In the previous year, there were 58 939 subject entries with a 90.7 per cent pass rate. Subject entries for Unit I was 42 215, of which 40 246 were sat with a pass rate of 90.4 per cent. A total of 18 219 subject entries were made for Unit II, of which 17 481 were sat with a pass rate of 92.3 per cent.

Public School - Subject entries for Units I and II made by public schools was 54 692. Of this number, 52 456 sat, with an average pass rate of 91.8 per cent. There were 38 188 subject entries for Unit I, of which 36 599 sat with a 91.4 per cent pass rate in Grades 1–3. For Unit II, there were 16 504 subject entries, with 15 897 sitting exams and a pass rate of 93.0 per cent. Public secondary schools had a total of 14 194 candidates

14. The 2020 performance data available for both the Caribbean Secondary Education Certificate (CSEC) and the Caribbean Advance Proficiency Examination (CAPE) examinations were preliminary. Once finalized, the Caribbean Examination Council will provide the revised figures.

15. Preparations for the Sitting of Exit Examinations. Retrieved from <https://moey.gov.jm/preparations-sitting-exit-examinations>

TABLE 22.7
PERFORMANCE OF PUBLIC SECONDARY SCHOOL STUDENTS AT THE GENERAL AND TECHNICAL PROFICIENCY LEVELS
TECHNICAL PROFICIENCY LEVELS, CARIBBEAN SECONDARY EDUCATION CERTIFICATE EXAMINATION, 2016–2020

Subjects	Number Sitting					Percentage Attaining Grades I-III				
	2016	2017	2018	2019	2020 ^P	2016	2017	2018	2019	2020 ^P
Arts										
Caribbean History	4 634	4 373	4 091	3 854	3 975	74.8	75.4	71.3	64.9	77.0
English Language	26 440	26 321	24 078	23 494	23 267	71.2	70.8	75.4	82.8	85.1
English Literature	7 168	7 040	6 453	6 454	6 513	68.5	55.3	81.6	68.8	80.7
French	746	927	897	797	826	80.8	77.8	79.8	68.4	75.9
Geography	4 146	3 970	3 919	3 967	3 706	67.4	63.3	71.0	73.0	78.6
Music	186	167	178	192	193	62.4	63.5	65.7	76.6	77.2
Religious Education	2 469	2 181	2 249	2 046	2 165	71.2	82.0	82.9	77.7	88.2
Social Studies	14 864	14 948	14 664	13 009	12 509	55.7	56.0	61.1	63.4	76.5
Spanish	3 950	4 318	4 064	3 815	3 652	71.6	66.6	69.7	69.3	67.4
Sciences										
Additional Mathematics	981	1 219	980	995	1 326	62.3	65.3	70.1	73.9	67.2
Biology	6 098	6 295	6 245	5 976	5 834	81.7	69.7	74.2	76.8	76.9
Chemistry	5 305	5 518	5 523	5 289	5 125	57.1	54.1	58.3	66.9	63.7
Human & Social Biology	9 386	9 001	8 955	8 350	8 280	52.5	55.3	61.7	49.6	49.1
Integrated Science	5 782	5 910	5 300	5 000	4 419	52.3	51.6	29.8	52.5	54.1
Mathematics	23 993	23 567	22 214	21 320	20 325	47.7	50.2	57.8	54.6	61.2
Physics	5 141	5 415	5 170	4 988	5 009	63.2	58.6	68.4	72.3	76.6
Technical/Vocational										
Agri. Science (AS)	2 940	3 145	3 135	3 094	2 988	86.8	91.3	83.9	90.9	91.2
Agri. Science (DA)	402	373	279	191	179	94.3	96.8	95.3	97.9	94.4
Building Technology Construction	994	-	-	-	-	77.3	-	-	-	-
Building Technology Woods	1 017	-	-	-	-	67.9	-	-	-	-
Electronic Document Prep. & Mgmt.	5 312	5 426	5 691	5 264	6 149	89.2	89.1	95.4	85.9	96.6
Family and Resource Management (formerly Home Management)	3 670	3 408	3 310	2 801	2 821	80.3	88.5	84.8	84.8	86.6
Food, Nutrition and Health (formerly Food and Nutrition)	5 326	5 211	5 238	4 737	4 542	89.4	92.0	90.1	90.5	91.7
Industrial Technology (Building)		1 937	1 891	1 971	1 985		74.0	77.0	85.3	83.3
Industrial Technology (Electrical) formerly Electrical and Electronic Technology	2 035	1 990	2 045	2 155	2 156	54.3	65.8	73.1	82.9	80.6
Industrial Technology (Mechanical) formerly Mechanical Engineering Technology	1 330	1 166	1 214	1 235	1 349	64.3	69.0	74.1	79.6	75.2
Information Technology	11 086	11 753	11 690	11 881	12 221	75.2	82.6	88.9	91.1	89.2
Phys. Ed. & Sports	3 882	4 451	4 606	4 821	5 136	96.0	96.2	96.3	97.0	93.5
Technical Drawing	3 634	3 664	3 749	3 788	4 123	63.0	70.2	77.9	81.6	76.4
Textiles, Clothing and Fashion (formerly Clothing and Textiles)	1 441	1 458	1 469	1 407	1 343	71.3	75.4	77.1	85.8	84.1
Theatre Arts	917	817	916	952	967	78.8	88.1	84.5	84.3	70.1
Visual Arts	1 791	1 908	1 867	1 656	2 019	67.5	67.9	62.1	73.4	67.5
Business										
Economics	1 199	1 135	1 330	1 517	1 509	71.6	84.1	74.1	72.8	74.4
Office Administration	3 938	3 964	4 120	3 652	3 919	76.3	85.2	85.0	87.3	91.1
Principles of Accounts	5 724	6 042	5 872	5 979	6 063	70.2	78.3	73.8	77.5	86.2
Principles of Business	8 739	9 289	9 402	8 854	9 062	92.7	91.4	89.6	90.7	93.8

p- preliminary data subject to change % passing is reflected of those sitting

Source: Policy, Analysis, Research and Statistics, MoEYI

entered for Units I and II.

Unit I - Candidates entered for Unit I totalled 14 098. There was an average pass rate of over 90.0 per cent in 23 subject areas. Three subjects had pass rate of 100.0 per cent. The subject with the lowest pass rate was Pure Mathematics, 59.8 per cent. Disaggregated by sex, females outperformed males in most subjects with the exception of Agricultural Science, Art and Design, Electrical and Electronic Technology Engineering Technology and Spanish.

Unit II - Candidates entered for Unit II was 8 018, a decrease of 1.4 per cent compared with 2019. Pass rates between 90.0 per cent and 100.0 per cent were observed in 25 subject areas. Females outperformed males in 15 subjects.¹⁶

TERTIARY EDUCATION AND TRAINING

Pre-university, tertiary and general education programmes are offered by community colleges, universities, teacher training colleges and polytechnic colleges. Enrolment at this level was estimated at 38 562 students, a reduction of 26.2 per cent relative to the previous year (Table 22.8). There were 2 408 students in continuing education, which is considered non-tertiary. A total of 1 983 educators were employed at this level.

The University of the West Indies (UWI) Mona

Enrolment at UWI, Mona was 17 331 students (12 025 females). Compared with the previous year, enrolment declined by 2.0 per cent, which was attributed to reduced enrolment in on-campus first degree programmes. Of total enrolment, 12 148 students (8 281 females) were enrolled full-time.

There was a 3.0 per cent reduction to 14 083 students in first degree enrolment. Reductions were noticeable in the larger faculties of Social Sciences, Humanities and Education, Medical Sciences and Science and Technology. For higher degree programmes, enrolment across all faculties increased by 2.0 per cent to 2 983, with the exception of the Social Sciences.

Graduates from the institution totalled 3 689 (2 732 females). There was a reduction by 5.4 per cent in the number of graduates in higher degree programmes. An increase of 1.7 per cent was evident in graduates of first degree programmes. In an effort to boost enrolment and competitiveness, a number of new academic programmes were approved (Box 2).

Northern Caribbean University (NCU)

Enrolment at NCU was 3 587 students, an increase of 5.0 per cent compared with the previous year. Graduates from the institution totalled 654 students (512 females). The following

BOX 2 NEW ACADEMIC PROGRAMMES APPROVED, UWI MONA, 2019–2020	
Engineering	B.Sc. • Civil Engineering (revised programme)
Humanities	B.A. • Writing, Literature and Publishing Licentiate • Philosophy
Science and Technology	B.Sc. • Environmental Biology • Major in Horticulture • Major in Marine Biology • Major in Plant Biology • Terrestrial & Freshwater Ecology • Level 1 Chemistry (revision) • Major in Geography (revised programme) • Applied Major in Geography (revised programme)
Social Sciences	B.Sc. • Political Science (revised programme) • Hospitality Management (Major/Minor) • Tourism Management (Minor)
Social Sciences (Weekend School)	B.Sc. • Banking and Finance Entrepreneurship • Marketing • Human Resource Management

adjustments were made in response to the Government issued protocols regarding the COVID-19 pandemic:

- establishment of a COVID-19 Health and Safety Implementation Committee to support the required measures concerning the safety and security of all personnel.
- transition from face-to-face to online teaching and learning though a hybrid/online mode of teaching had been in place for some offerings prior to COVID resulted in the need for training of other members.
- implementation of measures to offset the financial challenges included reduction in salaries and waiver of general fees.

As it relates to academic initiatives four students and one worker were granted scholarships to study in Canada and a Memorandum of Understanding was signed to facilitate international student exchange.

16. Applied Mathematics, Computer Science, Electrical and Electronic Technology Engineering Technology (Option B), French, Green Engineering, History, Literatures in English, Logistics and Supply Chain Operations, sociology and Spanish.

Edna Manley College of the Visual and Performing Arts

In response to COVID-19, the College rolled out an online platform which allowed for offerings in the majority of its programmes. A total of 464 students were enrolled in semester one, of which 414 were registered, and 50 completed course selection. Compared with the previous year, this was a 12.0 per cent decrease. At the end of semester two, total enrolment was 478.

Human Employment and Resource Training / National Service Training Agency Trust (HEART/NSTA Trust)¹⁷

Like other areas within the education and training sector, the COVID-19 pandemic negatively affected the HEART/NSTA Trust. Adverse effects included: enrolment (disruption in the start of programmes); certification (cancelled assessments); job placement; and reduction in revenue earned (full effect felt in April 2020). Notwithstanding this, total enrolment was 141 748 (Table 22.9). This represents an achievement of 95.3 per cent of the

planned enrolment and a 17.1 per cent increase of the total enrolment over the previous year (Table 22.10). Of the total enrolment, 60.0 per cent was females.

Of the total enrolment (141 748), 13.0 per cent were from the Adult Services (formerly the Jamaican Foundation for Lifelong Learning) programme, and 2.5 per cent were from the Youth Services interventions (formerly the National Youth Service). Several legacy NYS programmes, such as the Graduate Work Experience Programme (GWEP) and the Mentorship Programme were continued during the period. The Mobile Learning & Assessment Services¹⁸ which was implemented in 2018/2019, recorded enrolment at 3 042, accounting for 2.0 per cent of overall enrolment.

There were 50 599 persons certified (51.0 per cent of the annual target) {Table 22.10}. Certification from HEART training providers (Legacy) increased by 43.0 per cent. Adult Services accounted for 10.7 per cent of the total certification and Youth Services reported no certification. Another 891 individuals were certified through the Mobile Learning and Assessment Centre. By sex, certification was 26 516 female, 15 864 male and 8 219 individuals for which sex was not reported.

Programme activities executed by HEART included:

Hope Youth Summer Work Programme (HYSWP) – targets persons between the ages of 17 and 29 years and is geared towards the development of young persons through valuable work experience. A total of 14 500 participants were targeted for engagement in the programme. Actual enrolment in the programme was 16 627.

National Service Corps Programme (NSCP) – the delivery of training in core skills for ‘unattached’ youth. Employability and personal development skills such as Self-development, Career Development, Civics, Conflict Management and Family Life Management were delivered. Of the 8 685 individuals targeted for placement, 1 305 were placed.

Strategic Partnerships – the Trust continued its efforts to pursue the establishment of strategic partnerships in order to improve programme development and access to opportunities for training, certification, job placement, volunteerism and entrepreneurship for learners. The following partnerships were established:

- Caribbean Maritime Institute – to provide training in Mechatronics, 48 persons were trained
- German Ship Repair Jamaica – for the expansion of an Apprenticeship programme for Ship Welding and

TABLE 22.8
DISTRIBUTION OF ENROLMENT AT THE TERTIARY LEVEL (2019/2020)

Institution	Teritary	Non Teritary	Total
Polytechnic College (2)	844	0	844
Teachers' Colledge (5)	3 807	54	3 861
Bethlehem Moravian College	322	0	322
Moneague College	1 010	307	1 317
Community College (5)	7 652	1 686	9 338
G.C. Foster College of Physical Education and Sports	510	110	620
Edna Manley College of the Visual & Performing Arts	453	44	497
College of Agriculture, Science & Education	1 025	0	1 025
University of Technology ^a	0	0	0
University of the West Indies	17 331	0	17 331
Caribbean Maritime University ^a	3 149	207	3 356
TOTAL	36 154	2 408	38 562

a– 2018/2019 Registration Data

Source: Ministry of Education, Youth and Information

17. The Senate in 2019 approved the Bill which merged the HEART Trust/NTA with the National Youth Service (NYS), the Apprenticeship Board and the Jamaican Foundation for Lifelong Learning (JFLL). The Bill, entitled The Human Employment and Resources Training (Amendment) and Change of Name Act, 2019, was passed with 17 amendments.
18. This programme is an approach built on the increased usage of flexible assessments delivery, mobile assessment labs, devices and portable apparatus within the Organisation to expand its core business.

TABLE 22.9
ENROLMENT AND OUTPUT OF SKILLED AND SEMI-SKILLED MANPOWER FROM NON-FORMAL HUMAN DEVELOPMENT AND RESOURCE TRAINING/ NATIONAL TRAINING AGENCY PROGRAMMES, 2018/19–2019/2020

SKILL AREAS	ENROLMENT				OUTPUT				ENROLMENT				OUTPUT			
	2018–2019				2018–2019				2019–2020				2019–2020			
	Male	Female	Unkn-own	Total	Male	Female	Unkn-own	Total	Male	Female	Unkn-own	Total	Male	Female	Unkn-own	Total
Agricultural Skills	1 159	1 036		2 195	395	239		634	1 433	901		2 334	662	400		1 062
Construction	9 589	995		10 584	2 731	273		3 004	11 742	1 132		12 874	3 847	368		4 215
Creative Industries	504	713		1 217	107	288		395	436	626		1 062	136	322		458
ICT	7 618	11 693		19 311	2 279	3 872		6 151	6 226	8 769		14 995	1 958	3 213		5 171
Mining & Quarrying	67	2		69	10	0		10	65	2		67	26	1		27
Manufacturing	605	398		1 003	119	133		252	468	412		880	118	169		287
Services	11 891	16 444		28 335	3 751	5 361		9 112	16 518	25 046		41 564	5 814	9 941		15 755
Tourism	5 874	16 483		22 357	1 955	6 058		8 013	6 293	18 771		25 064	2 114	6 722		8 836
Other (Non-Vision 2030 Sectors)	3 078	10 733		13 811	1 651	4 414		6 065	3 506	14 498		18 004	1 182	5 377		6 559
Null ^a	4	7	22 163	22 174	0	2	6 285	6 287	14	7	24 883	24 904	7	3	8 219	8 229
Grand Total	40 389	58 504	22 163	121 056	12 998	20 640	6 285	39 923	46 701	70 164	24 883	141 748	15 864	26 516	8 219	50 599

a – Unknown' SEX due to insufficient data at the time of reporting.

Source: Information Systems and Technical Services Divison, HEART/NSTA Trust

Ship Engine Repair. A total of 17 persons were trained in Ship Welding

- National Spatial Data Management Branch – 39 trainees were enrolled at Junction, Newport and the HEART College of Information and Technology. This initiative was later expanded to include the Ministry of Economic Growth and Job Creation/National Spatial Data Unit and Marle Tech Park/Geo Tech Vision.

The High School Diploma Equivalency (HSDE) programme provides a 'second chance' for adult learners to strengthen their literacy and numeracy skills through three programme options— Basic (Grades 1–6); Intermediate

(Grades 7–9) and Proficiency (Grades 10–11). A total of 17 171 individuals were targeted for training under the HSDE programme. Actual enrolment was 18 489, an increase of 17.0 per cent. Certification was attained by 60.1 per cent of the target (see Table 22.10).

The Board of Directors of HEART/NSTA Trust approved funding for nine Micro, Small and Medium size Enterprises (MSMEs). A total of 110 participants in the Rural Youth Economic Empowerment Programme (RYEEP) benefited from grants in the amount of \$7.5 million. Additional support was provided to the sector through a Memorandum of Understanding to provide

TABLE 22.10
TWO YEAR ENROLMENT AND CERTIFICATION BY TRAINING PROVIDER, 2018/19–2019/2020

Institution	2018/19		2019/2020	
	Enrolment	Certification	Enrolment	Certification
HEART Training Providers	77 109	27 263	97 181	38 963
NYS – NSCP	6 106	0	3 582	0
Adult Services (HSDE)	15 807	6 285	18 489	5 407
MOE – CAP	10 952	3 876	9 173	3 162
MOE – Other Secondary Schools	9 591	2 013	10 595	2 419
Private Providers	1 491	486	2 728	648
Total	121 056	39 923	141 748	50 599

Source: HEART/NSTA Trust

\$5.0 million in support for Export Max III through the on-going partnership with JAMPRO. The Organisation also established five Incubators in its Workforce Colleges in an effort to support training in emerging skills.

During the reporting period, all programmes delivered by HEART/NSTA Trust operated institutions were aligned to labour market, of which, 37.0 per cent of programmes delivered were aligned to emerging areas. The further integration and expansion of TVET in the training system was enhanced through the development of Qualification Plans which was aligned to the labour market. A total of 15 Qualification Plans were developed for implementation, while 10 were revised.

The Trust continued to develop programmes for delivery using flexible modalities. A total of 20 programmes were targeted for development for delivery online of which 18 were completed.

Management Institute for National Development (MIND)

Enrolment at the Institute was 3 601 persons (2778 female), a decrease of 30.3 per cent relative to the previous year. The number of persons graduating from the institution totalled 2 544. Performance highlights for the Institute included the training of approximately 4 000 public sector professionals across 179 delivered learning interventions; advanced development of the Professional Pathways, Competency Framework and other key deliverables under the Public Sector Learning Framework (PSLF); and the hosting of eight stakeholder engagement sessions, including policy fora and Training Managers' Network meetings.

OUTLOOK

For the 2021–2022 period, the Ministry of Education, Youth and Information will focus on completing the carry over legislative agenda from 2020–2021 while also placing efforts on the:

- Jamaica Teaching Bill which seeks to establish the Jamaica Teaching Council and a system of licensing teachers to improve the status of the teaching profession
- Amendments to the Education Act and Regulations which will modernize the legal and regulatory framework governing the statutory system of public education to deal with outstanding issues.

Other initiatives will include:

- the acceleration of the transitioning of a number of basic schools into infant schools and infant department
- the development of the Higher Education Policy and

drafting of supporting legislation which will provide a comprehensive framework aimed at streamlining Jamaica's higher education system so that it works in a cohesive and efficient manner in meeting the needs of the nation

- the institutionalising of the Career Advancement Programme into the Sixth Form Pathways for learning which is provided for under the Seven Years of Secondary Schooling Policy which is being advanced
- the finalisation of the Pathways to Education Policy as well as the ICT in Education Policy and Master Plan and the Special Education Policy.

The Government, in continuing with its mandate to upgrade the infrastructure of educational facilities, has earmarked an allocation of over \$1.5 billion for the 2020/2021 Capital Projects. Infrastructural activities will result in the expansion of educational facilities; electrical upgrading; and construction of security fences, among others. Such activities are likely to positively impact primary and secondary level students as the Government invests in quality resources for schools which will lead to greater levels of access to education and learning.

The education sector will continue to devise various initiatives and strategies to facilitate continued innovative approaches in teaching and learning whilst the COVID-19 pandemic continues. Widespread usage of online technology as well as audio and audio visual usage may have to be continued to ensure that students are fully engaged. Activities to be carried out by the Ministry will include:

- providing all schools with internet connectivity
- equipping schools with online facilities for teaching and learning
- providing more devices for students and teachers to facilitate the teaching and learning process
- ongoing and sustained teacher professional development at all levels of the system; aiming for more accountability and better student achievements at all levels of the system.

An increase in the number of Jamaicans enrolled in HEART/NSTA Trust programmes is anticipated as the Trust rolls out programmes aimed at improving the skillset of the Jamaican labour force. Under the German Ship Repair Jamaica programme, training in Ship Engine Repair is scheduled to begin in Fiscal Year 2021/22.

The final report of the Public Expenditure Review is expected by the end of the first quarter of 2021. The review of the education sector is an ongoing partnership with UNICEF, World Bank and GOJ. It is anticipated that the review will support the Government to better monitor and report on the expenditures on education, as well as plan and respond to the needs of the sector.

For the upcoming period, MIND plans to review and update its Risk Management Policy and attendant standard operating procedures to reflect its adoption of the international standard for risk management ISO: 31000, while seeking to ensure alignment with the Government's

Enterprise Risk Management Policy. Additionally, the findings of the Tertiary Hunger Study, a collaboration between J-TEC and Utech, Jamaica, is expected to be published in the upcoming year. ■

HEALTH

INTRODUCTION

The year 2020 radically altered the global health landscape. The novel coronavirus, SARS-nCoV2 (the virus that causes COVID-19), emerged in Wuhan City China, in December 2019. The outbreak of coronavirus disease (COVID-19) quickly grew from a localized issue in China to a public health challenge in approximately 200 countries and territories globally. The World Health Organization (WHO) declared the outbreak of the coronavirus disease a public health emergency of international concern on January 30, 2020, and the COVID-19 outbreak was characterized as a pandemic on March 11, 2020¹. In December 2020, the WHO announced the Food and Drug Administration's (FDA) approval of vaccines that could help to combat the spread of the virus.

The first case of COVID-19 disease in Jamaica was confirmed on March 10, 2020. A multi-sectoral/interagency approach to the COVID-19 pandemic response was initiated under the Disaster Risk Management Act. These efforts were coordinated by the Disaster Risk Management Council, an inter-ministerial body led by the Prime Minister, while the Ministry of Health and Wellness (MOHW) led the health response. Interagency directives were issued by the Council through Public Orders for the implementation of widespread public health measures. These measures included border closures, stay-at-home orders, reduced working time, all island and targeted community curfews, and physical school closures, some of which had an impact on existing vulnerable populations and created additional vulnerabilities. The interagency responses focused on the vulnerable including the poor and addressed direct as well as indirect health issues.

The Health response was coordinated by the MOHW's Emergency Operation Centre (EOC). Quick, real-time decisions were made on how to best adapt medical facilities to better prepare and respond to the fast-paced evolving demands. These responses included: preparation of "COVID-19 beds/spaces" in health facilities; implementation of rigorous sanitation measures; imposition of adequate social distancing; and maintenance of continuity of care for existing patients.

The pandemic also negatively impacted the provision of services in other areas such as, immunization, health promotion, non-communicable diseases (NCDs), HIV/AIDS/ and other Sexually Transmitted Infections (STIs), elective surgeries, and temporary closure of some clinics such as non-communicable disease clinics. The health sector re-shaped the strategies used in the delivery of care, such as redeployment and retraining of some categories of staff (community Health Aides), task shifting to fit the increasing demands for disease surveillance, and the scaling back of some health services.

In addition, the emerging threat posed by the pandemic, coupled with that of existing diseases to public health, placed increased demands on health expenditure. In response, allocation to the health sector was increased and was also supported by international and local partners. The flu season, which began in November, coincided with the COVID-19 and dengue outbreaks. While COVID-19 remained the most significant public health threat, the seasonal threat by influenza and dengue, posed a triple threat of diseases for the most vulnerable and placed added strain on the public health system. The three viruses share similar symptoms such as headache and fever which posed a challenge in distinguishing which one was present. Jamaicans were encouraged to get vaccinated for the flu virus while immediate public health measures for the prevention of dengue (fogging, monitoring of Aedes indices) were implemented.

Despite the challenges faced by these emerging and re-emerging diseases, the MOHW continued its efforts to provide the requisite expertise, technology, and infrastructure, which underpinned the achievement of its strategic objectives for the year. These efforts included but were not limited to equipping High Dependency Units; retrofitting of facilities to quarantine; isolate and care for persons who are suspected or confirmed to have COVID-19; procurement of more than \$500.0 million in prescription drugs through the National Health Fund (NHF) to ensure the effective treatment of the symptoms of persons with COVID-19; and upgrading of 10 physical facilities including accident and emergency departments

1. [WHO Director-General's opening remarks at the media briefing on COVID-19 - 11 March 2020](#)

TABLE 23.1a
NATIONAL EXPENDITURE ON HEALTH, 2009–2018 (\$)

SELECTED INDICATORS	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total Health Expenditure (THE) as a % Gross Domestic Product (GDP)	5.2	5.3	5.2	5.9	5.9	5.7	6.2	5.7	6.0	6.0
General Government Health Expenditure (GGHE) as % of GDP	2.9	3.0	2.8	3.3	3.4	3.5	4.1	3.7	3.9	4.0
GGHE as % of THE	56.1	56.3	53.6	55.7	58.1	62.3	66.9	64.0	64.7	65.0
Private Expenditure on Health (PvtHE) as % of THE	43.9	43.7	46.4	45.8	41.9	37.7	33.1	34.7	33.3	34.0
Out of Pocket Expenditure as % of THE	31.2	31.0	32.9	29.4	25.4	19.7	17.5	17.9	17.2	17.0
External Health Expenditure as a % of CHE	n/a	n/a	n/a	n/a	n/a	n/a	n/a	1.2	2.0	1.0

n/a – not available

Source: Ministry of Health and Wellness

and/or waiting rooms.

This chapter will review the status of the key health indicators for 2020 inclusive of financing of the health sector; general health status of the population; the COVID-19 response; health service delivery, and utilization; programmes supporting service delivery and contribution from partners in health care.

HEALTH SECTOR FINANCING

The General Government Health Expenditure (GGHE) as a percentage of the Total Health Expenditure (THE) remained consistently above 60.0 per cent since 2014 and registered 65.0 per cent in 2018 (Table 23.1a).² The government's budgetary allocation to the sector as presented in the provisional Estimates of Expenditure for the Financial Year 2020/2021 was approximately \$78.0 billion, a 5.8 per cent increase compared with the revised estimates for the previous financial year (Table 23.1b).

Net Recurrent Expenditure for all Health Affairs and Services fell under three broad categories: Health Administration (\$5.4 billion); Hospital Services (\$6.4 billion); and Public Health Services (\$61.2 billion). The National Health Fund (NHF) through Appropriation in Aid funded \$744.0 million of the total recurrent budget for Health Affairs and Services (see Table 23.1b). Net recurrent expenditure on health affairs and services increased by 5.6 per cent moving to \$72.2 billion in the financial year 2020/2021.

For the FY 2020/21, an estimated \$61.2 billion was allocated to specific health institutions including the RHAs (see Table 23.1c). Allocations for Direction and Administration to Regional Health Authorities (RHAs) were SERHA \$576.9 million; WRHA 459.5 million; SRHA \$405.5 million; and NERHA \$274.9 million. However, services such as Rehabilitation and Maintenance Work (\$976.9 million), National Laboratory Services (NLS) {\$1.4 billion}, Delivery of Health Services (\$ 47.7 billion), and the Provision of Pharmaceutical and Medical Supplies (\$8.8 billion) for the regions were allocated centrally (see Table 23.1c).

In FY 2019/20, Departments of the Ministry of Health and Wellness (MOHW), Bellevue Hospital, and Government Chemist received a recurrent budgetary allocation of \$1.9 billion and \$68.7 million, respectively (see Table 23.1b). Compared with the previous year, allocations to the Bellevue Hospital increased by 2.1 per cent and allocations to the Government Chemist increased by 7.0 per cent. Capital estimates for management of projects financed by the consolidated fund or multilateral agencies for the financial year 2020/2021 include the redevelopment for Cornwall Regional Hospital (\$1.8 billion), and the western children's hospital (\$251.0 million).

2. The Government of Jamaica's (GOJ) budget continued to be the main source of financing for the public health sector. Data on health expenditure as a percentage of GDP usually reflects a two-year lag.

TABLE 23.1b
MINISTRY OF HEALTH AND WELLNESS AND ITS DEPARTMENTS RECURRENT AND CAPITAL BUDGETS
BY PROGRAMME, 2019/20-2020/21
(\$'000)

FUNCTIONS	REVISED ESTIMATES 2019/20	PROVISIONAL ESTIMATES 2020/21
RECURRENT		
Health Affairs & Services		
Health Administration	5 302 846.0	5 372 185.0
Executive Direction & Administration	5 037 424.0	5 188 381.0
Training	265 422.0	
Regional & International Cooperation		
Health Sector Regulation		183 804.0
Outpatient Services	218 886.0	
Disaster Management	218 886.0	
Hospital Services	5 939 484.0	6 384 945.0
Delivery and Management of Health Care		6 384 945.0
Public Health Care Programme	5 939 484.0	
Public Health Services	57 542 325.0	61 152 931.0
Delivery of Early Childhood Education	17 000.0	
Health Services Support	1 533 149.0	
Family Planning	273 562.0	
Delivery and Management of Health Care		61 152 931.0
Public Health Care Programme	55 530 606.0	
Prevention and Control of Drug Abuse	188 008.0	
Total Health Affairs and Services	69 003 541.0	72 910 061.0
Total Recurrent	69 003 541.0	72 910 061.0
Less Appropriation in Aid	657 926.0	744 000.0
Net Recurrent	68 345 615.0	72 166 061.0
DEPARTMENTS		
Bellevue Hospital	1 866 613.0	1 905 496.0
Government Chemist	64 205.0	68 700.0
Total Departments	1 930 818.0	1 974 196.0
Total Ministry of Health and Departments	70 276 433.0	74 140 257.0
CAPITAL		
Health Affairs and Services	5 630 533.0	3 903 604.0
Health Administration		
Health Services Support	2 395 533.0	
Health Service Delivery	3 235 000.0	
Delivery and Management of Health Care		3 903 604.0
Total Budget -Capital	5 630 533.0	3 903 604.0
Less Appropriation-in-Aid	2 162 000.0	
Net Total Budget -Capital	3 468 533.0	3 903 604.0
Recurrent and Capital	73 744 966.0	78 043 861.0

Source: Estimates of Expenditure 2020/21

TABLE 23.1c
MINISTRY OF HEALTH AND WELLNESS RECURRENT BUDGET FOR 2020/21
 (\$'000)

HEALTH INSTITUTIONS	ESTIMATES 2020/21
Health Services	58 872 777.0
Rehabilitation and Maintenance Works	976 920.0
National Laboratory Services (NLS)	1 429 844.0
Delivery of Health Services	47 667 284.0
Provision of Pharmaceutical and Medical Supplies	8 798 729.0
Regional Health Authorities (RHAs) System Support	2 280 154.0
Direction and Administration	
SERHA	576 896.0
NERHA	274 873.0
WRHA	459 486.0
SRHA	405 511.0
St Joseph's Hospital	344 000.0
National Council on Drug Abuse (NCDA)	209 788.0
Enforcement and Compliance Service	9 600.0
Total	61 152 931.0

Source: Estimates of Expenditure 2020/21

COVID-19 budget

There was disruption in the regular flow of funds allocated to health in the 2019/2020 financial year budget. This was due to disruption in services, increased expenditure on employment and the loss of revenue from public health inspections. In fulfilling the transformative programming for COVID-19, the Government of Jamaica (GOJ) budgeted just under \$6.0 billion for the MOHW's response efforts. Of that sum, approximately \$3.8 billion was spent on containment measures and some \$775.0 million in financial support was disbursed to the regional health authorities for response efforts. Major infrastructural upgrades for health facilities, including the creation and equipping of 63 intensive care and high dependency beds, resulted in expenditure of more than \$89.0 million, while the cost of protective gear and COVID-19 test kits was more than \$1.7 billion. Some interventions covered under the COVID-19 expenditure were co-financed by international donor entities for health, such as, the Pan American Health Organization, the Centers for Disease Control and Prevention, and the Global Fund. Among these were the cost of surveillance, information campaigns, transportation, community quarantine and extraction exercises, physical infrastructure, staffing and training, public relations, and marketing (see chapter on Official Development Assistance).

The government's allocation was supplemented by grant funding from International Development Partners (IDPs) such as the Inter-American Development Bank

(IDB); World Bank; Pan American Health Organization (PAHO)/World Health Organization (WHO); the European Union (EU); the Global Fund to Fight AIDS, Tuberculosis, and Malaria (GFATM); the United Nations Population Fund (UNFPA); and the United States Agency for International Development (USAID) {see chapter on Official Development Assistance}.

LEGISLATION, POLICIES AND PLANS

During the year, the MOHW focused on the development and completion of several articles of legislation, policies, plans and programmes designed to improve efficiency and effectiveness of service delivery. The following were major achievements:

Jamaica HIV Sustainability and Transition (S&T) Plan Draft Report (2020)

Jamaica developed a prioritized Sustainability and Transition Plan with support from UNAIDS. The plan was designed to assume increasing domestic responsibility for the HIV programme and outlined a road map for efficient transition while extending and sustaining the disease control gains that have been achieved. The finalized plan highlighted challenges, gaps, and opportunities within the context of the HIV response in Jamaica. Major risks to the HIV programme sustainability and transition identified from the broader analysis were:

- discriminatory laws reduce HIV treatment, testing

uptake and generally heighten the risk for HIV spread

- integration of National Family Planning Board-Sexual Health Agency (NFPB-SHA) into a broader national coordinating body may impede management of Jamaica's HIV response
- few economic studies have been conducted in Jamaica to serve as practical tools for HIV budget projections
- no transition plan to ensure sustainability of the HIV response
- declared political will has not translated into adequate and stable increases in investment in health care due to fiscal challenges in the country
- HIV prevention strategies targeting vulnerable populations have traditionally been financed by external donors with little involvement from the state.

National Information System for Health (IS4H) Strategic Plan (2021–2025)

Work continued on the development of the National Information System for Health (IS4H) Strategic Plan aimed at enabling a sustainable, integrated, safe, and equitable national health system that is planned and managed through evidence-informed decisions and is responsive to the needs of the country and its people. The plan is centred around four main strategic goals:

- **Management and Governance** – to modernize IS4H organizational structures and functions through the strengthening of the IS4H governance framework
- **Data Management and Information Technology** – to strengthen IT infrastructure and support in the public health sector and the development of a National Shared Electronic Health Record Open Platform to improve patient management and inform decision-making
- **Innovation** – to implement digital tools that will improve the quality, safety, and continuity of patient and client care
- **Knowledge Management and Sharing** – to strengthen networks and partnerships through national and international academic and research organizations.

GENERAL HEALTH STATUS

Life expectancy at birth in Jamaica was estimated at 74.2 years in 2011 compared with 71.5 years reported in 2001, indicating that Jamaicans are living longer.² Life expectancy differs between males and females, being 78.0 years for females and 70.5 years for males in 2011. The

country is experiencing crude birth rate (CBR) of 12.1 per 1 000 population³ (see chapter on Population).

The well-being of the population is measured by the use of wellness indicators from the *Jamaica Survey of Living Condition (JSLC) 2018*. The self-reported results showed that the perception of health was generally good to very good across all age groups at an average of 84.5 per cent. A larger proportion of males (87.0 per cent) perceived themselves to be in good to very good health relative to females (82.0 per cent). The proportion of persons reporting at least one NCD generally increased as consumption levels increased, ranging from 21.1 per cent in Quintile 2 to 27.9 per cent in Quintile 5. Women in the working age (15–64 years) and elderly (60 years) reported generally higher proportions of NCDs compared with males in corresponding age groups. For women 60 years and over, hypertension (59.7 per cent), diabetes (29.4 per cent) and arthritis (28.1 per cent) were most prevalent. Data from *JSLC 2018* also showed that the prevalence of asthma (9.4 per cent) remained highest among children 0–17 years old.

Approximately 6.8 per cent of Jamaicans surveyed reported illness/injuries, with the average duration of an episode of illness being approximately eight days. Among the respondents who were ill/injured, 88.8 per cent had an illness only and 7.5 per cent had an injury only. Approximately two-thirds (65.6 per cent) of the ill/injured sought care. Some 50.5 per cent continued to seek care at public health facilities exclusively compared with 44.0 per cent for private health facilities.

BIRTHS AND DEATHS

Data from the Registrar General's Department (RGD) and the MOHW for births and deaths, as at the time of writing, data from the Statistical Institute of Jamaica were unavailable. Preliminary data reported by RGD, showed the total number of deaths in the population was 18 100 compared with 19 200 reported in 2019. Compared with 2019, there was a decline in the number of deaths occurring by health region. Deaths occurring in the SRHA declined by 7.1 per cent; SERHA by 6.2 per cent; NERHA by 5.2 per cent; and WRHA by 4.6 per cent (Figure 23A).

The crude death rate was estimated at 6.6 per 1 000 population (see chapter on Population). The latest available data from STATIN (2018) showed the leading causes of deaths in Jamaica were Diabetes Mellitus (2 375); Cerebrovascular Diseases (2 234); deaths by External Causes (2 168); Hypertensive diseases (1 518); Ischaemic Heart disease (1

3. Statistical Institute of Jamaica, *Population and Housing Census, 2011: Jamaica, General Report Volume 1* (Kingston: STATIN, 2013), p.i.v.

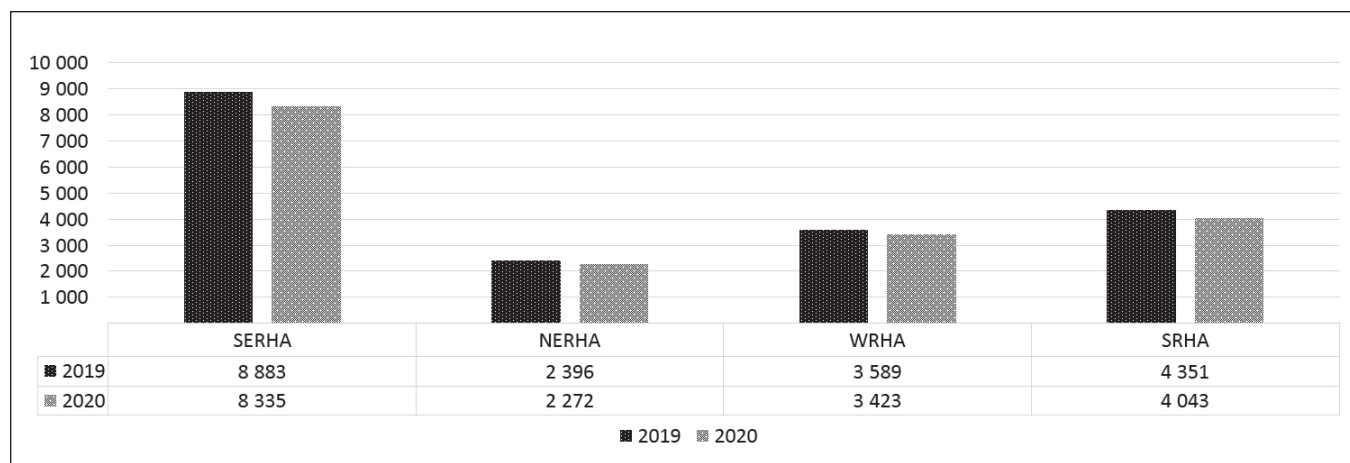


FIGURE 23A: DEATHS OCCURRING BY HEALTH REGIONS 2019, 2020

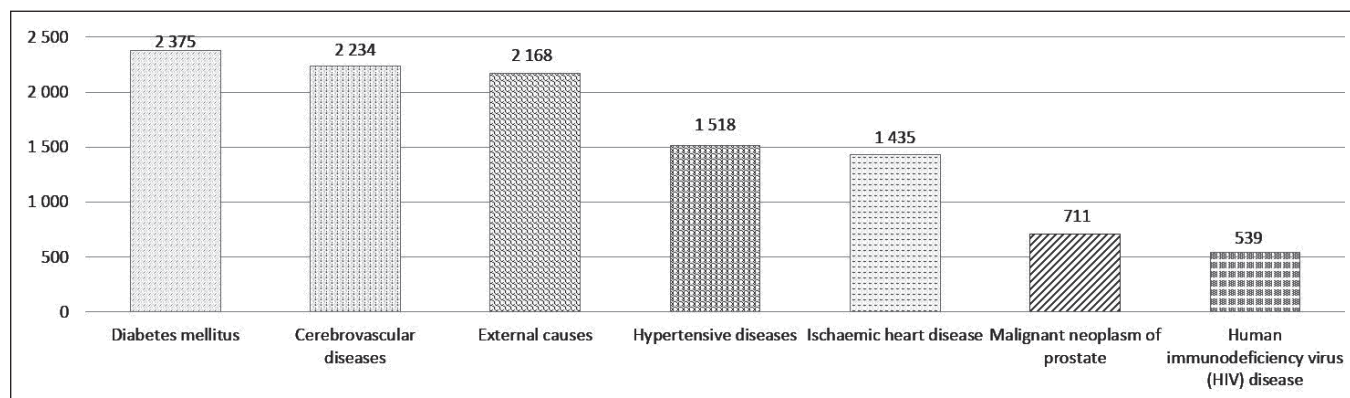


FIGURE 23B: LEADING CAUSES OF DEATH AMONG JAMAICANS, 2018

435); Malignant Neoplasm of the prostate (711); and Human Immunodeficiency Virus Diseases (539) {Figure 23B}⁴. The top five leading causes of death among females 5 years and over were Diabetes Mellitus followed by Cerebrovascular Diseases, Hypertensive Diseases, Ischaemic Heart Diseases, and Other Heart Diseases (Table 23.2). Among males, the leading causes of death were Deaths by External Causes,⁵ Cerebrovascular Diseases, Diabetes Mellitus, and Ischaemic Heart Disease (Table 23.2).

Births

Preliminary data reported by the RGD showed that total live births occurring in 2020 was approximately 33 800, compared with 34 900 recorded in 2019 (Figure 23 C). The NERHA showed the largest difference in the number of

births from 4 900 recorded in 2019 to 4 500 in 2020, (8.2 per cent). The SERHA recorded the largest number of births (15 049), but showed a 3.9 per cent difference relative to 2019 (Figure 23C).

INJURIES AND OTHER EMERGENCIES

For the period January–December 2020, data from public hospitals across the island showed that there was a 44.9 per cent decrease to 79 374 visits for intentional, unintentional, and other critical emergencies in Accident and Emergency Units across the island, compared with the 144 157 reported in 2019 (Table 23.3)⁶. Of the total injuries reported, 44.7 per cent were classified as Unintentional, 10.5 per cent as Intentional and 45.0 per cent were classified as Other Emergencies.

4. STATIN demographic Statistics 2018.

5. External causes are death by injury, poisoning and certain other consequences of death

6. January to December (2019 & 2020) data for Accident and Emergency Units in public hospitals did not include the UHWI

TABLE 23.2
DEATHS OF THE POPULATION FIVE YEARS AND OVER BY SEX AND CAUSE, 2015–2017

Causes of Deaths	Male			Causes of Deaths	Female		
	2015	2016	2017		2015	2016	2017
Deaths by External Causes	1 671	1 645	1 801	Diabetes Mellitus	1 289	1 373	1 384
Cerebrovascular Diseases	1 114	1 110	1 110	Cerebrovascular Diseases	1 236	1 174	1 142
Diabetes Mellitus	825	966	991	Hypertension Diseases	741	786	818
Malignant Neoplasm of Prostate	651	671	711	Ischaemic Heart Disease	689	720	679
Ischaemic Heart Disease	795	779	756	Other Heart Diseases	336	313	298
Hypertension Disorders	670	734	700	Malignant Neoplasm of the Breast	390	734	388
Human Immunodeficiency Virus (HIV)	311	323		Human Immunodeficiency Virus (HIV)	224	216	230

Note:

- (i) Deaths are classified according to the International Classification of Diseases and related Health Problems, World Health Organisation (Tenth Revision for ICD 10).
- (ii) R00-R99 Classification relates to deaths for which Medical Certification is pending
- (iii) Deaths from external causes (V01-W99) represent those for which the Registrar General's Department is in receipt of all the full and complete documentation regarding cause of death as well as those reported by the police but not yet registered by the RGD

Source: Registrar General's Department

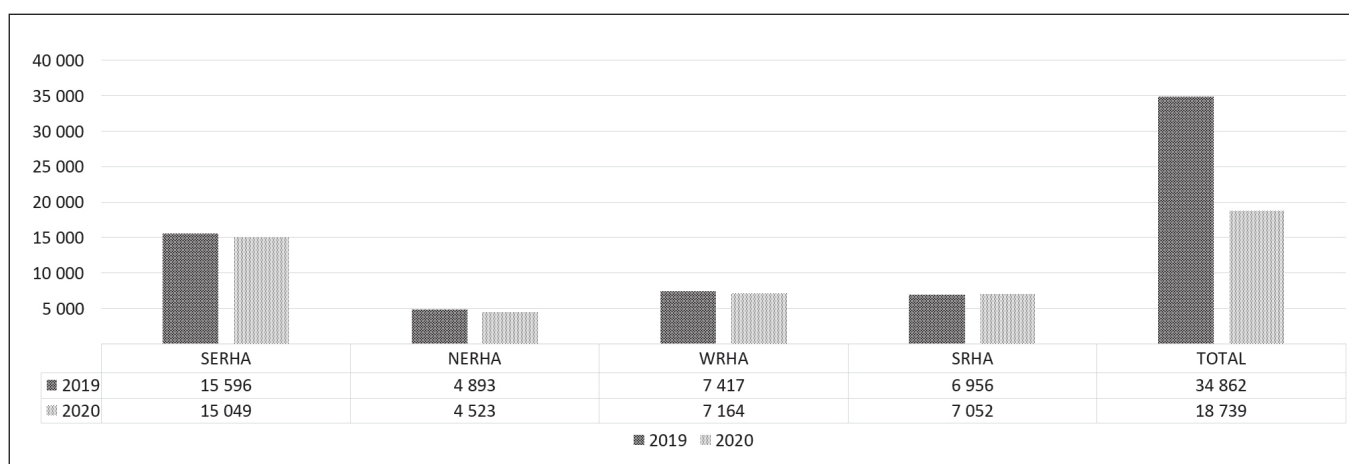


FIGURE 23C: BIRTHS OCCURRING BY HEALTH REGIONS 2019 AND 2020

Intentional and Unintentional Injuries

The most frequently reported Unintentional Injuries were Motor Vehicle Accidents (30.6 per cent), followed by Falls (30.7 per cent), and Accidental Lacerations (21.1 per cent). For Intentional Injuries, the main reports were Blunt Injuries (41.0 per cent); Intentional Lacerations (27.3 per cent), and Stab Wounds (13.7 per cent). Provisional data from the MOHW showed that approximately 15.5 per cent (6 793) of visits to Accident and Emergency (A&E) units due to intentional and unintentional injuries were reported for children in the 0–9 years age group (Table 23.3). Compared with 2019, this represented a 22.9 per cent (8 809) reduction.

Unintentional injuries among males 10–19 years decreased by 26.3 percentage points compared with the 13.9 percentage points increase reported in 2019. The

pandemic may have had an impact on the number of violent injuries reported in 2020. Motor Vehicle Accidents and Accidental Lacerations collectively accounted for 60.9 per cent of injuries in this age group. The majority of unintentional injuries among the 20–64 years' age group was from Motor Vehicle Accidents (MVAs) {8 458}, Falls (4 765), and Accidental Lacerations (4 268). Relative to 2019, MVAs declined by 18.0 per cent, Falls by 12.4 per cent, and Accidental Lacerations by 13.6 per cent.

Intentional injuries were higher (53.4 per cent) among females 10–19 years. The main intentional injuries among 10–19 age group were blunt injury (32.7 per cent) and Sexual Assault (28.3 per cent). The majority of intentional injuries among persons in the 20–64 years age group was Blunt Injury (40.3 per cent) and Intentional Laceration (30.7 per cent).

TABLE 23.3
PATIENTS SEEN IN ACCIDENT & EMERGENCY UNITS OF PUBLIC HOSPITALS
BY DISCHARGED DIAGNOSIS CONDITION, SEX AND AGE, 2020

Discharged Diagnosis	Total cases seen	Under 5 yrs		5–9 yrs		10–19 yrs		20–29 yrs		30–44 yrs		45–64 yrs		65 + yrs	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F
Unintentional Injuries															
Drowning/near drowning	157	19	5	16	8	5	9	12	8	17	12	20	10	6	10
Burns	925	164	95	51	31	84	42	77	55	85	55	77	66	23	19
Poisoning	612	136	128	22	19	26	32	28	27	47	42	42	45	10	8
Motor Vehicle Accidents	10 829	111	90	143	101	1074	452	2961	921	2002	779	1286	509	293	101
Intentional laceration	2 283	9	1	18	6	177	87	454	227	520	199	388	104	72	14
Accidental Lacerations	7 469	505	293	625	291	867	284	1024	353	1061	377	1025	428	232	99
Bites	2 299	141	71	160	73	213	142	217	166	224	220	266	219	102	83
Falls	10 874	1017	745	778	454	1089	445	688	504	734	652	1105	1082	695	873
Total	35 448	2 102	1 428	1 813	983	3 535	1 493	5 461	2 261	4 690	2 336	4 209	2 463	1 433	1 207
Intentional Injuries															
Intentional Lacerations	2283	9	1	18	6	177	87	454	227	520	199	388	104	72	14
Attempted Suicides	155	0	0	1	0	10	65	24	21	13	10	8	2	0	1
Stab Wounds	1146	1	0	5	1	122	39	340	87	292	66	158	20	12	3
Gun Shot	648	2	0	6	2	45	9	201	30	191	23	107	17	13	2
Blunt Injury	3422	101	60	96	46	285	179	473	360	461	340	577	268	122	49
Sexual Assault	703	4	39	9	60	23	379	3	104	0	43	1	25	4	9
Total	8 357	117	100	135	115	662	758	1495	829	1 477	681	1 239	436	223	78
Other Emergencies															
URTI	7339	1958	1536	527	454	335	388	214	410	187	386	223	376	170	170
LRTI	9947	1696	1190	473	398	307	326	214	339	423	509	1056	881	1334	799
Asthma	13316	982	623	982	631	1067	1074	649	1067	657	1132	1552	1351	955	580
Gastro-Enteritis	4967	691	590	260	267	278	273	301	400	307	371	346	421	196	264
Total	35 569	5 327	3 939	2 242	1 750	1 987	2 061	1 378	2 216	1 574	2 398	3 177	3 029	2 655	1 813

Note: Provisional data for the period January – December, 2020

Provisional data: January – December 2020. NB: Total includes Age and Sex unknown

Unknown ages were included in the total cases seen.

Data for the University Hospital of the West Indies not available

URTI: Upper respiratory tract Infection

LRTI: Lower respiratory tract Infections

Source: Ministry of Health and Wellness, Planning and Evaluation Branch

Other Emergencies

The largest categories in Other Emergencies included Asthma (37.4 per cent); and Upper and Lower Respiratory Tract Infections (49.0 per cent){see Table 23.2}. Other emergencies seen in the A&E for the 0–9 age group included 8 232 cases of Upper and Lower Respiratory Infections, a 68.4 per cent increase relative to 2019. In addition, there were 3 218 visits for children with Asthma reflecting a 67.3 per cent decrease compared with the corresponding period in 2019. A total of 1 808 children with Gastroenteritis were also seen (see Table 23.3). The injuries data for the 65 years and over age group represented 12.6 per cent for Other Emergencies. Most emergency room visits for the elderly were for Other Emergencies.

OTHER PUBLIC HEALTH THREATS

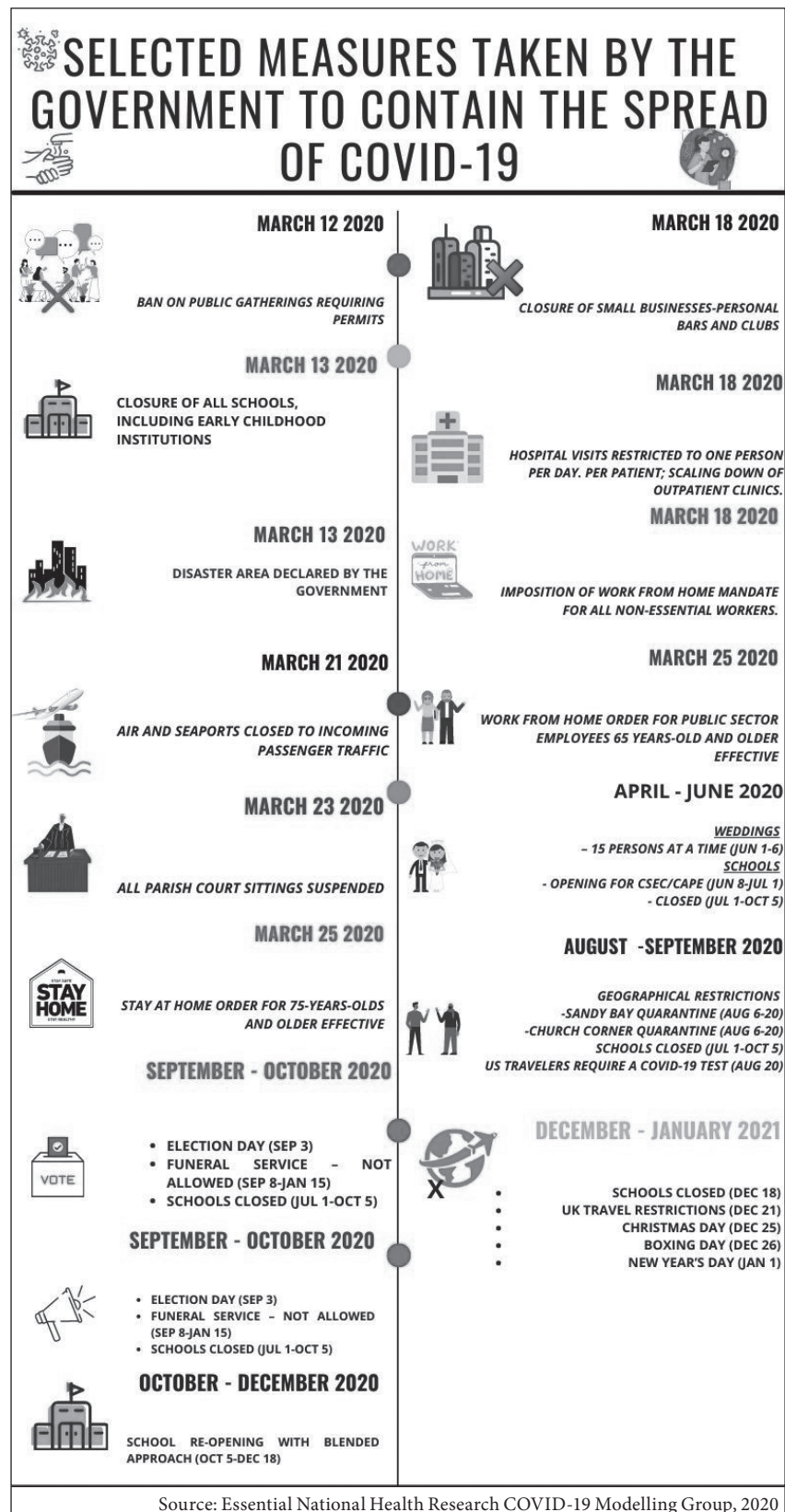
At the time of writing, the country was still in the response phase to the sustained COVID-19 pandemic, with intermittent spikes in confirmed cases of the disease while also responding to other disease outbreaks. Reports from the National Surveillance Unit indicated that there were 648 cases of influenza SARI cases as well as the threat of vector borne diseases such as dengue. In response to the dengue outbreak between 2019 and 2020, special prevention interventions included a national dengue clean-up, employment of 1 000 temporary vector control workers, and procurement of 57 new vehicles equipped with mounted fogging machines.

Sars-Cov2, The Coronavirus Disease 2019 (COVID-19) Pandemic

The 2019 novel coronavirus is among the coronaviruses, a family of viruses that causes a range of respiratory illnesses ranging from the common cold to more severe illnesses. The 2019 novel coronavirus is a new strain that was not previously identified in humans. The virus was subsequently named the “SARS-CoV2” by the World Health Organization and is responsible for the current pandemic of COVID-19 disease⁷.

In December 2020, the COVID-19 outbreak was in its 10th month since the first case was confirmed in Jamaica on March 10, 2020. Since January 31, 2020, rules of quarantine in relation to COVID-19 for inbound international travellers from specified areas or territories were issued. After the first case was identified in March 2020, Jamaica was declared a disaster area under the *Disaster Risk Management Act 2015 (Disaster Area Order 2020)*⁸. The MOHW Emergency Operation Centre (HEOC) was activated and was enhanced to coordinate the response in Jamaica. In keeping with the COVID-19 Response Plan for the Health Sector, an aggressive Risk Communication and Community Engagement Programme, as well as an Enhanced Surveillance Programme, were launched.

As the spread intensified, measures were put in place to curb the spread. Early interventions included the immediate upgrade of some health facilities to accommodate an additional 63 intensive care and high dependency units as well as areas to facilitate isolation of the confirmed cases. Subsequently, communities where a significant number of cases were identified were placed under quarantine for two-weeks periods. As cases increased steadily throughout March 2020, the government introduced several other measures to contain the spread. The measures included the imposition of all-island curfews, ban on public gatherings, closure of schools and



Source: Essential National Health Research COVID-19 Modelling Group, 2020

7. <https://www.euro.who.int/en/health-topics/health-emergencies/coronavirus-covid-19/novel-coronavirus-2019-ncov>

8. [The Disaster Risk Management Acts | Ministry of Justice - Government of Jamaica \(moj.gov.jm\)](https://www.moj.gov.jm/)

early childhood institutions, closure of air and sea ports, imposition of work from home mandates, restrictions of hospital visits and infirmary, and scaling down outpatient clinics. The restrictions were modified at various times throughout the year.

At the end of December 2020, a total of 168 124 samples were tested at the laboratory with 12 915 COVID-19 positive tests. This represented a 7.7 per cent positivity rate. Of the number of confirmed cases in Jamaica, 10 532 were fully recovered and released. A total of 303 deaths were recorded, 313 449 persons remained in isolation across the island, and seven persons were in one Government quarantine facility.

Of the total confirmed cases, 54.4 per cent were females. The ages of affected persons ranged from 1 year to 104 years with a mean age of 39.4 years. The largest proportion of cases (22.7 per cent) was in the 20–29 year age group (Box 1).

The source of infection for 75.0 per cent of those affected was under investigation, 12.0 per cent was infected through contact with a confirmed case, 7.1 per cent was local transmission not epi linked, while 4.4 per cent was imported.

More than half (51.4 per cent) of the confirmed cases resided in St Catherine, Kingston, and St Andrew. St James followed with 10.6 per cent, St Ann 6.2 per cent, and Westmoreland 5.3 per cent (Appendix 23D). Portland reported the least number of cases. Towards the end of the year, there were 600 active cases and the country was experiencing community transmission (Box 2). Approximately 27.0 per cent of active cases as at December 2020 resided in the parishes of Kinston and St Andrew (100 cases) and St Catherine (86 cases).

Vaccines

Regulatory experts from around the world were summoned by WHO to review data on the PFIZER/BioNTech Vaccine's safety, efficacy, and quality. The review found the vaccine to have met the standards set out by the WHO. In December 2020, the Comirnaty COVID-19 mRNA

BOX 1: CHARACTERISTICS OF CONFIRMED COVID-19 CASES AS OF DECEMBER 31, 2020		
Characteristics	No.	%
Age		
0-9	562	4.4
10-19	877	6.9
20-29	2909	22.7
30-39	2582	20.2
40-49	1879	14.7
50-59	1619	12.7
60-69	973	7.7
70-79	578	4.6
80-89	302	2.4
90-99	76	0.6
100+	1	0.0
unknown	408	3.2
Total	12 915	100.0
Median age	39.4	19.1
Median age	37	28
Age Range	1 day-104 years	
Sex		
Female	7 031	54.4
Male	5 882	45.5
Unknown	2	0.0
Total	12 915	100.0
Source of Infection		
Contact of a confirmed case	1 544	12.0
Imported	571	4.4
Local Transmission (not epi linked)	919	7.1
Under Investigation	9 645	74.7
Workplace cluster	236	1.8
Total	12 915	100.0
Source: National COVID_19 Epidemiological Data as of December 31, 2020		

BOX 2: COVID-19 TRANSMISSION PATTERNS JANUARY TO MARCH 9		
Date of Transmission Pattern Jamaica	Category	Definition
Up to March 9, 2020	No cases	Territories/areas with no cases
March 10, 2020	Sporadic cases	Counties /territories/areas with one or more cases, imported or locally detected
March 14, 2020	Clusters of cases	Counties /territories/areas experiencing cases, clustered in time, geographic location, and/or by common exposures
September 2, 2020	Community transmission	Counties/ area/territories experiencing larger outbreaks of local transmission defined through an assessment of factors including, but not limited to: <ul style="list-style-type: none"> - Large numbers of cases not linkable to transmission chains - Large numbers of cases from sentinel lab surveillance - Multiple unrelated clusters in several areas of the country/territory/area

vaccine (Pfizer/BioNTech vaccine) was listed for emergency use, making the Pfizer/BioNTech vaccine the first to receive emergency validation from WHO since the beginning of the outbreak (January 2020). Countries, including Jamaica, were mandated to expedite their own regulatory process to import and administer the vaccine.

HEALTH SERVICE DELIVERY

The Health sector comprises a combination of public and private entities. Within the public health system, secondary and tertiary care is offered through 24 hospitals (including the quasi-government, teaching hospital of the University Hospital of the West Indies) and has a

combined capacity of 4 802 beds. Hospital inpatient services within the public system are offered to the population through 18 general and 6 specialist hospitals (including the Sir John Golding Rehabilitation Hospital). There are also four community hospitals that offer mainly maternity, child health, and/or curative services. Public sector hospitals provide over 95.0 per cent of hospital-based care while the private sector dominates the pharmaceutical and diagnostic services, and provides approximately 50.0 per cent of the ambulatory care through a network of general physicians and specialists, private laboratories, pharmacies, and hospitals. Health care in the private sector included 10 private hospitals with a bed complement of approximately 200 and over 495 pharmacies.

Primary level health care, which refers to visits to health centres and community hospitals, was offered through 331 clinics and 23 satellite clinics within the public health system with other health institutions that include the National Public Health Laboratory⁹ and the Blood Bank.¹⁰ Within the Primary Care structure, the island is divided into Health districts on a demographic basis. Each health district is served by a series of health centers offering different levels of service and are classified as Type 1–5 in relation to services offered and the population served.¹¹ The total population to be served in a health district is between 20 000 and 30 000 people. Outpatient specialty clinics are also offered at hospitals for patients who need follow-up services.

Health service delivery in the public system is organized through four Regional Health Authorities (RHAs)—South East Regional Health Authority (SERHA); Western Regional Health Authority (WRHA); Southern Regional Health Authority (SRHA) and North East Regional Health Authority (NERHA). Service coverage across the regions was attained through the network of primary, secondary, and tertiary level health facilities.

UTILIZATION OF PUBLIC HEALTH SYSTEM

The impact of COVID-19 was evident in the interruption of services at secondary care facilities. There were adjustments to utilization of the public health service due to the scaling down of outpatient services and specific consultation clinics; cancellation of elective surgeries; and population screening programmes were closed based on the government's directive. This led to a decrease in outpatient volume due to patients not presenting at clinics as well as a decline in inpatient volume was due to cancellation of

THERE ARE FOUR TYPES OF HOSPITALS:

Type A - are multi-disciplinary institutions which provide both secondary and tertiary care and are the final referral points for such services. Institutions at this level are the Kingston Public, Cornwall Regional Hospitals and the University Hospital of the West Indies.

Type B - are situated in the larger urban centers, and provide inpatient and outpatient services in at least the six basic specialties – emergency medicine, general surgery, general medicine, obstetrics and gynaecology, paediatrics and anaesthetics. X-ray and Laboratory services are usually available to serve hospital patients as well as those from Primary Health Care and the local private sector.

Type C - are the basic district hospitals which interface with the Primary Health Care system at parish level. Inpatient and outpatient services are provided in emergency medicine, general medicine, surgery, child and maternity care. Basic X-ray and Laboratory services are usually available to serve hospital patients as well as those from Primary Health Care and the local private sector. Many of these hospitals also provide the services of a specialist surgeon to ensure the availability of emergency surgical services.

TYPE S - SPECIALIST HOSPITALS

1. The Bellevue Hospital which provides psychiatric and rehabilitative services for the mentally ill.
2. The Victoria Jubilee Hospital which provides obstetric and gynaecological care to women island wide.
3. The Bustamante Hospital for Children which provides medical, surgical and specialist services to children under age 12 years.
4. The Hope Institute which provides care for terminally ill cancer patients.
5. The National Chest Hospital provides care for chest diseases both medical and surgical.

9. The National Public Health Laboratory carries out examinations in the areas of routine analysis, biochemistry, haematology, T.B and enteric bacteriology, and serology in addition to other specialized tests
10. The Blood Bank offers blood collecting and transfusion services and other specialized services for the entire island.
11. Type I : serves not more than 4 000 persons; Type II for a population of about 12 000 persons; Type III serves about 20 000 persons; Types IV and V serve the parish population 30 000–60 000. MOHW 2020.

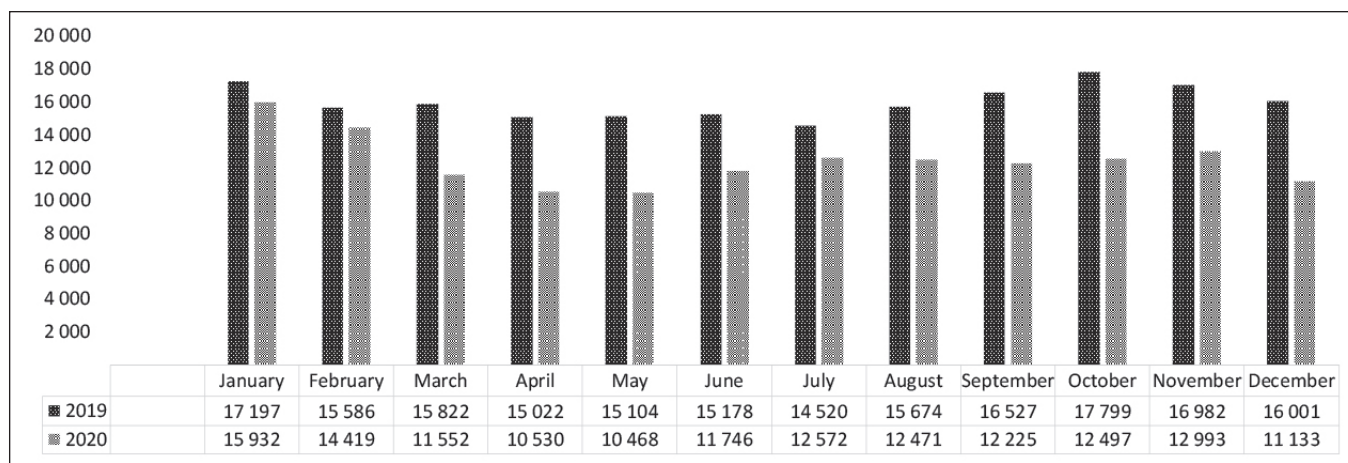


FIGURE 23D: TOTAL HOSPITAL ADMISSIONS 2019 AND 2020

elective care. There was also the unavailability of inpatient services/hospital beds as they were dedicated to patients with presumed or confirmed diagnoses of COVID-19. The capacity of the staff to provide additional services was also limited as some were redeployed to provide COVID-19 relief. Other non-health issues impacted service utilization such as public transport lockdowns, which hindered access to health facilities, and financial constraints which resulted in persons missing appointments.

Secondary Care

Data from the MOHW's Hospital Monthly Statistical Report (HMSR) showed that admissions to hospitals in 2020 declined by 22.4 per cent to 148 538 compared with 191 412 admitted in 2019 (Figure 23D). Admissions gradually decreased from January (15 932) through March (11 552) when the first case of COVID-19 was identified but further decreased to 10 468 in May, a 30.7 per cent

decline compared with the previous year and the lowest number of admissions in a given month. Admissions gradually increased towards the end of the year to 12 993 in November, but still recorded a decrease of 23.5 per cent compared with November of the previous year. When examined by type of hospital, admissions to Type A hospitals decreased by 30.5 per cent to 38 390 patients. Type B hospital admissions (48 753) decreased by 15.5 per cent, Type C (41 321) by 16.8 per cent while specialist hospital admissions (20 074) decreased by 30.6 per cent (Figure 23E).

The highest number of admissions in Obstetrics totalled 46 032, a 9.4 per cent decrease over the previous year. Admissions to General Medicine (44 691) and General Surgery (34 532) also decreased by 11.5 per cent and 15.6 per cent, respectively. Psychiatry accounted for the lowest numbers seen (3 826) a 23.7 per cent decline relative to 2019 (Figure 23F).

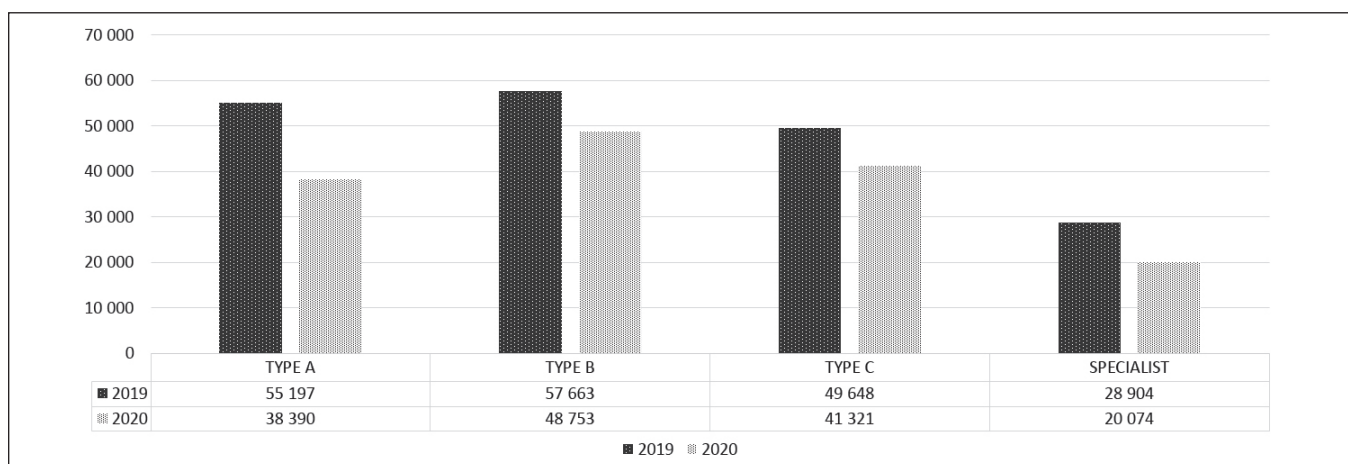


FIGURE 23E: TOTAL ADMISSIONS BY TYPE OF HOSPITAL 2019 AND 2020

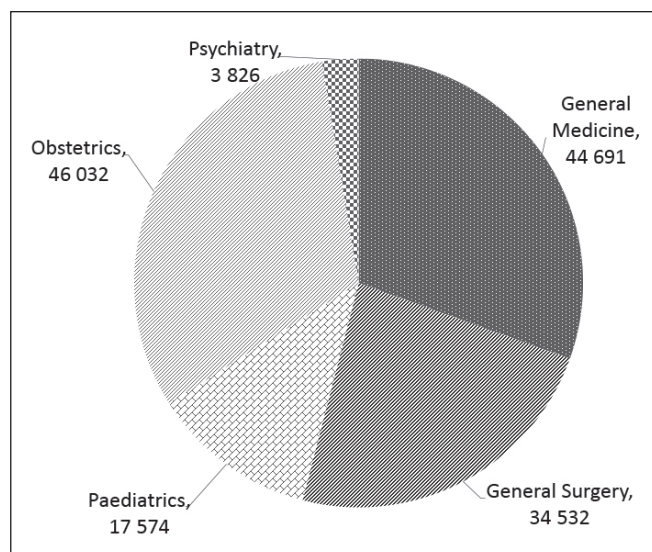


FIGURE 23F: TOTAL ADMISSIONS BY PUBLIC HOSPITAL SPECIALITY, 2020

University Hospital of the West Indies (UHWI)

Amidst the COVID-19 crisis, the UHWI urged the public and private medical practitioners, as well as hospitals referring patients there, to make contact ahead of referrals and transfers due its limited 66-bed capacity for COVID_19 isolation and the burden of continuing to fulfil the demands for general care. Total admissions for general patient care for UHWI was 11 444 over the period January to December (Table 23.4). This constituted 4 171 admissions for general medicine, 4 412 on general surgery, 596 for paediatrics, 235 psychiatry and 1 484 for obstetrics. Of the admissions, 98.0 per cent (11 271) were discharged.

Pharmacies in Public Hospitals

The National Health Fund indicated that approximately 2.2 million prescriptions are generated in the public health system annually. Pharmacy services were delivered at ‘Drug Serv’ pharmacy locations through in-patient and out-patient services in collaboration with pharmacy partners and the NHF Quick Prescript’ system.

Provisional data from the MOHW indicated that 748 232 patients accessed pharmacy services at public hospitals compared with 716 819 the previous year (Table 23.5). The total number of prescribed items dispensed from public hospital pharmacies was 2 461 203 up from 2 408 209 in 2019. Due to stay at home orders caused by the pandemic, in some health centres and hospitals, provisions were made for home delivery for some patients with chronic conditions including NCDs and HIV. More Out-patients (73.0 per cent) accessed pharmacy services than In-patients (see Table 23.5). The South East Region (SERHA) dispensed the largest amount (614 649) of the overall prescribed items (see Table 23.5).

Additional government funding was allocated to essential health services during the COVID-19 pandemic for Outpatient, Inpatient, and Emergency unit services. Pre-hospital emergency care services (e.g. ambulance transport) were also given extra support for the extraction of persons with acute respiratory illnesses from nursing homes to health facilities. Additional interventions to maintain continuance of essential services required workforce task-shifting, resource allocation, and diversion of supply chains with central procurement of critical supplies, tools, and equipment supplied by the National Health Fund.

**TABLE 23.4
NUMBER AND UTILIZATION OF PUBLIC HEALTH FACILITIES, 2020**

REGIONAL HEALTH AUTHORITIES	PARISHES	FACILITIES		POPULATION ^a	TOTAL ADMISSIONS	TOTAL DISCHARGES (Including deaths)
		Health Centres	Hospitals			
South East	Kingston, St Andrew, St Thomas, St Catherine	91	10	1 285 900	65182	64 663
North East	Portland, St Mary, St Ann	74	4	371 700	23493	22 877
Western	Trelawny, St James, Hanover, Westmoreland	80	4	477 900	27599	26 668
Southern	St Elizabeth, Manchester, Clarendon	73	5	591 400	30381	29 706
TOTAL		318	24	2 726 700	146 655	143 914
UHWI					11 444	11 271

a - STATIN 2017 population data

Note: Admission and Discharges are for the period January–December, 2020

End of year population figures for 2018 are used

Source: Ministry of Health and Wellness and the Statistical Institute of Jamaica

TABLE 23.5
PHARMACY SERVICES AT PUBLIC HOSPITALS BY REGION, 2020

REGION	Number of Items Prescribed		Number of Items Dispensed		Total Number of Patients that Accessed Pharmacy Services	
	In-patient	Outpatient	In-patient	Outpatient	In-patient	Outpatient
Total Jamaica	593 934	1 969 612	735 363	1 725 840	198 689	549 543
South East	113 224	319 850	276 696	337 953	33 119	71 884
North East	120 931	485 801	115 870	351 385	47 156	124 278
Western	109 681	260 321	105 097	229 419	40 089	84 234
Southern	250 098	903 640	237 700	807 083	78 325	269 147

Note: Data is provisional for the period January–December 2020

Source: Ministry of Health and Wellness

Primary Care

As with the other systems that were impacted by the pandemic, the primary health care services were also affected. To contain the spread of the virus, government stay-at-home orders issued in March 2020, gave instructions for hospital visits to be restricted to one visitor per patient per day as well as the scaling down of outpatient hospital clinics and redirecting of some patients to the health centres and private physicians within their communities. Overall visits to health centres totalled 1 812 219, reflecting a 13.0 per cent decrease compared with 2019 (Figure 23G). During the months of March (155 823) and April (109 144), the lowest numbers of visits were recorded; this was when the pandemic started. The visits to health centres then fluctuated for the rest of the year, registering the largest number of visits in July (171 554).

Services most utilized in health centres were curative

(985 204) followed by Child Health services (197 103), Family Planning Services (187 084) (Figure 23H). Compared with 2019, Oral Health services showed the greatest decline of 37.9 per cent to 82 722 visits followed by Post Natal Services which declined by 36.7 per cent to 74 792 visits, and Child Health services by 15.5 per cent to 197 103 visits. Curative Services fluctuated over the period but more so in April, September and December. However, Other Services increased by 33.1 per cent to 71 541 visits, while Antenatal Service increased by 5.9 per cent to 131 621 visits (see Figure 23H).

Measures to contain Primary care services in the COVID_19 Pandemic

Innovative measures were applied where appropriate for the provision of community-based care and mobile clinics, particularly pharmacy services and sampling services for the

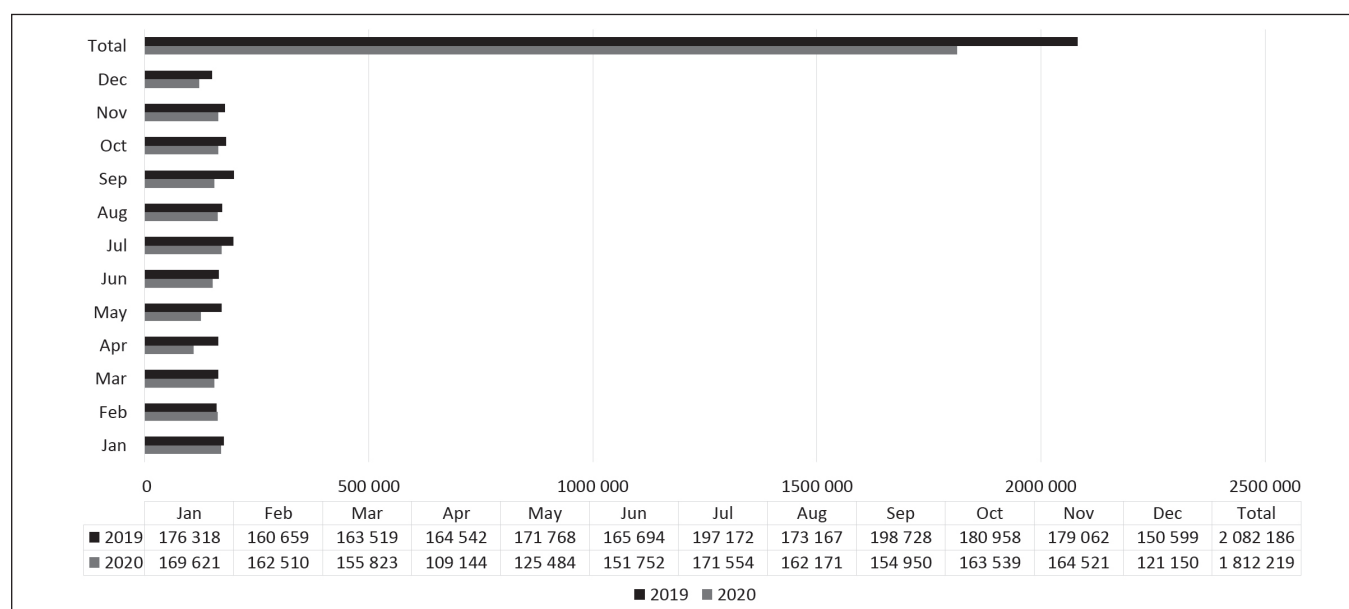


FIGURE 23G: TOTAL CLINIC VISITS 2019, 2020

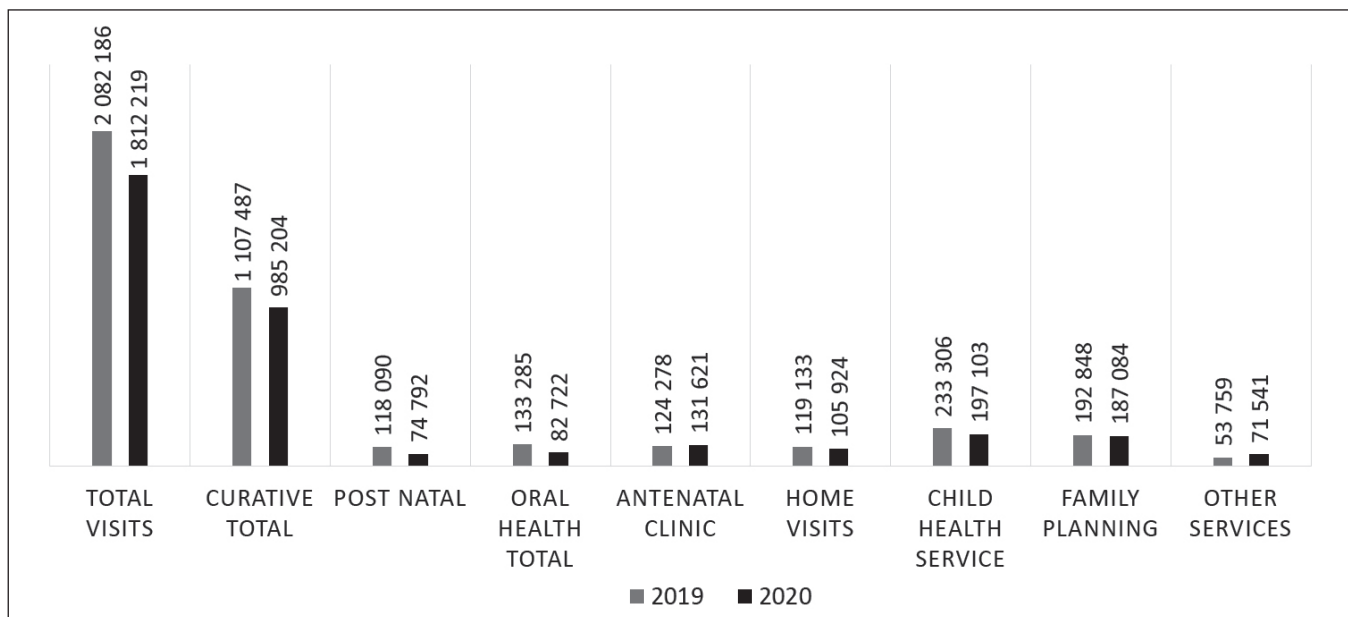


FIGURE 23H: SPECIALIST CLINICS VISITS IN PRIMARY CARE 2019 AND 2020

testing for COVID-19. Medicalising non-traditional facilities for the provision of basic health monitoring while isolating affected persons was also put in place. For the most part, the measures were effective at preserving family planning and contraception, antenatal care, routine immunization services in health facilities and sick child services, and continuation of established antiretroviral (ARV) treatment for HIV.

THE REGIONAL HEALTH AUTHORITIES

There was a general decline in hospital admissions across all health regions. In NERHA, hospital admissions showed the largest percentage decrease of 21.8 per cent, followed by

SERHA with a 17.7 per cent decline, SRHA a 14.2 per cent decrease and the least decline of 11.3 per cent registered in the WRHA (Figure 23I). Admissions were curtailed by diversion of patients to health centres and private physicians, closure of clinics, cancellation of non-emergency surgeries as well as government stay at home orders. The regional authorities were not able to carry out the majority of their programmes due to the pandemic. However, the following were accomplished:

North East Regional Health Authority

- Reformation of the delivery of health education and

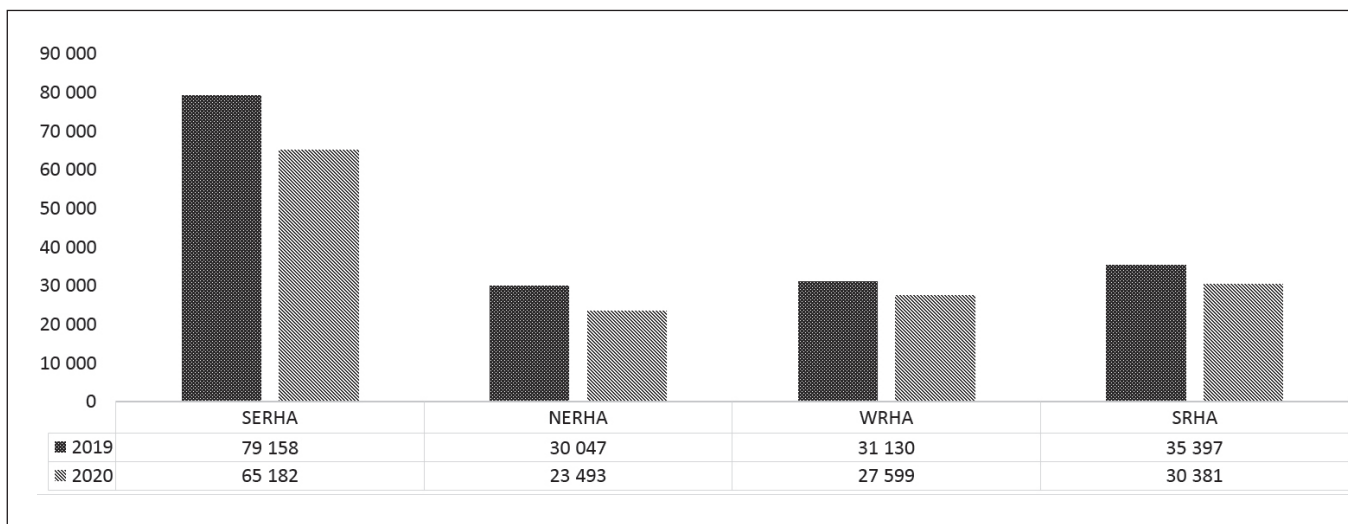


FIGURE 23I: HOSPITAL ADMISSIONS BY REGIONS 2019, 2020

health promotion services included utilizing mass and social media platforms to share critical information creatively. A total of 51 652 persons were reached across the parishes of St Ann, Portland, and St Mary. A total of 131 086 Information Education and Communication (IEC) materials were mounted at key locations and distributed to the public

- The HIV clients were visited by treatment teams as some were fearful and did not access clinic services. Activities carried out by the HIV team to address this challenge included: home visits with medical doctors and nurses; multi-month dispensing of anti-retroviral (ART) to stable clients; delivery of ART by health care worker or NHF pharmacy delivery; virtual consultations with clients by adherence counsellors, social workers, psychologists; and virtual support group sessions
- Mental health interventions reached 27 172 in comparison to 27 125 in 2019. Interventions in the Child and Adolescent Mental Health Services (CAMHS) accounted for 1 960 or 7.2 per cent of the total interventions. The incidence of new cases was 848, an 18.0 per cent decrease.

Western Regional Health Authority

- General hospital indicators showed a decline in all areas except the average length of stay (ALOS) which showed a 0.7 per cent increase. Hospital admissions declined by 15.0 per cent compared with the 31 130 recorded in the previous year. Despite the reduction in the number of visits, which was largely impacted by COVID-19, there was an increase in the number of prescriptions received and items dispensed by the pharmacy. Although patients were not seen physically, telephone screening was done and prescriptions written and made available for pick up
- As of December 2020, the WRHA reported a total of 2 719 COVID-19 positive persons. Of that number, 86.0 per cent have already recovered, 7.0 per cent remains active and 3.0 per cent were repatriated. A total of 68 persons reportedly died from a COVID-19 related illness in the region.

Southern Regional Health Authority (SRHA)

- Quality environmental health services were a priority for the region with the consistent monitoring of the Aedes index indicators attaining over 70.0 per cent coverage. Standard operating procedures were established to accomplish this goal
- The workplace health promotion activities and organizational support that encouraged healthy behaviour among employees to improve their health

and wellness ensued. The aim was to assist 12 places of employment to develop initiatives for healthy eating and physical activities. Six communities and 13 workplaces commenced physical activity programmes. These were further impacted by the pandemic, however, persons reported using the programme to introduce better lifestyle practices into families and communities

- Beneficiaries under the Programme for the Reduction of Maternal and Child Mortality, were the Spanish Town and Victoria Jubilee Hospitals (Neonatal Intensive Care and Maternity High Dependency Units); and Bustamante Hospital for Children (Neonatal Unit High Dependency Unit). These units were officially handed over to the MOHW.

South East Regional Health Authority

- A total of 7 311 Outpatient clinics were held and a total of 216 989 visits. There was a 30.0 per cent decrease to 14 551, in the number of operations performed compared with the previous year. This decrease in the number of reported inpatient operations could largely be attributed to the scaling down of operation services due to the COVID-19 Pandemic
- This region recorded the highest number of COVID-19 cases since March 2020. As at December 2020, a total of 7 076 cases were confirmed, of which 140 deaths were classified as COVID-related deaths while 92.7 per cent recovered
- Training continued for the strengthening of the HIV programme. This included: 8 Female Sex Workers (FSW) who were trained as Peer links; 10 empowerment sessions/training held with 112 FSW in the areas of goal settings, gender-based violence, family planning and managing stress along with HIV/STIs information; and 12 FSW received school grants.

PROGRAMMES SUPPORTING HEALTH SERVICES DELIVERY

Programme For Non-Communicable Diseases

The National Plan for the Prevention and Control of Non-Communicable Diseases (NCDs) is the strategic framework that guides the programme. While the Plan expired in 2018, the strategies remain relevant to the prevention and control of NCDs. The goal of the strategic and action plans is to reduce by 25.0 per cent by 2025, the burden of preventable morbidity and disability and avoidable premature mortality due to non-communicable diseases and injuries.

A total of 87 706 visits for Diabetes (DM) only, Hypertension (HTN) only, or Diabetes and Hypertension were reported in public health facilities across the island over the period (Figure 23J). The largest number of visits, 56 026,

was for patients with Hypertension only followed by 23 482 with both Hypertension and Diabetes (see Figure 23 J). Of that number approximately 73.0 per cent were females (Figure 23K).

Throughout the year, major programmes and projects geared towards patients with NCDs included:

- The MOHW continued implementation of the Inter-American Development Bank Loan to support the Health Systems Strengthening for the Prevention and Care Management of Non-Communicable Diseases Programme. Major achievements under this programme included:
 - Completed geotechnical studies and topographical survey to facilitate further design works by the consultants, project planning and management limited (Bulgaria)
 - Completed technical specifications & penultimate budget for medical equipment for 13 health facilities (10 health centres and three hospitals)
 - Procured industrial laundry equipment for three hospitals – Spanish Town, May Pen, and St Ann’s Bay
 - Established site office in St Catherine, Clarendon & St Ann
 - Prepared bill of quantity for information communication technology (ICT) infrastructure to 107 health facilities
 - Prepared scope of works for Electronic Health Record (EHR) platform
 - Conducted open EHR training

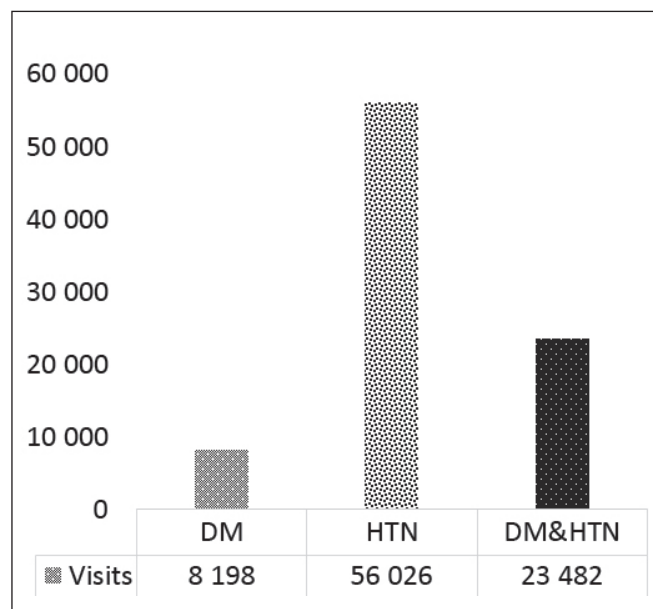


FIGURE 23J: VISITS FOR PATIENTS WITH HYPERTENSION, DIABETES OR BOTH, 2020

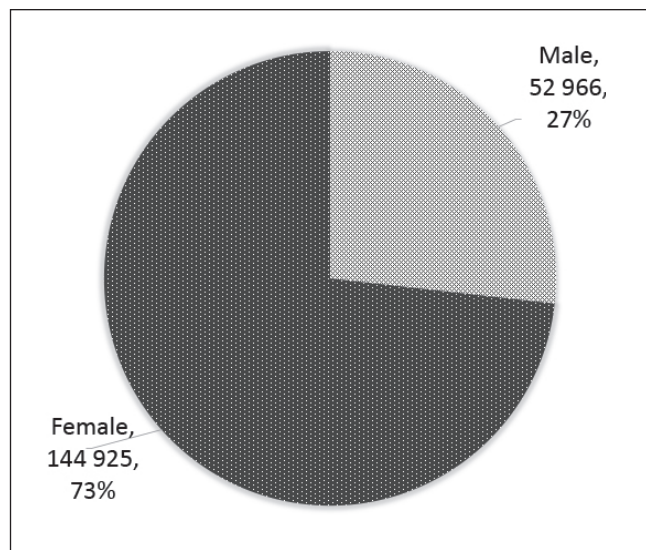


FIGURE 23K: CHRONIC DISEASE VISITS TO HEALTH CENTRES BY GENDER, 2020

- Commenced the Extension of Community Health Outcomes (ECHO) training sessions
- Prepared EHR requirements document
- Prepared Personal Health Information Protection (PHIP) Guidelines for public health sector organisation
- Prepared data process flow for three major hospitals
- launched the Public-Private Partnership for Non-communicable Diseases (PPP4NCDs), which engaged private general practitioners in the shared management of primary care clients with hypertension and/or diabetes
- commenced Phase 1 of the Glycosylated A1c (HbA1c) programme to enhance point-of-care testing for glucose control for primary care clients with diabetes
- formation of the Sickle Cell Clinical Management Subcommittee to provide technical support for improving Jamaica’s Sickle Cell Disease Programme
- prepared Cabinet Submission for the proposed exemption of fees at Public Pharmacies for all persons with Sickle Cell Disease

Other major achievements supporting the reduction of NCDs included: completion and dissemination of the interim guidelines for clinical management of diabetes and hypertension; completion of the National Screening Guidelines which received internal (MOHW) approval; and various commemorative events celebrated in collaboration with internal and external stakeholders.

Essential National Health Research

The declaration of the COVID-19 pandemic resulted in the readjustment of the plans and priorities of the Ministry, including an enhanced focus on research on COVID-19. The Essential National Health Research Committee (ENHRC) of the Ministry established a National COVID-19 Research Agenda which involved the conduct of research under seven Research Working Groups Clinical/Laboratory; Epidemiological/Surveillance: Case and Contact; Epidemiological/Surveillance: Household and Community; Health Systems; Socio-economic; Communication; and Data Management and Documentation. Membership of Working Groups included over 70 individuals from 15 organizations.

A Coordinated Research Roadmap for COVID-19 was developed in June 2020, while an accompanying implementation plan and budget were developed in September 2020. The Ministry received support from other development partners to conduct selected research activities (see diagram).

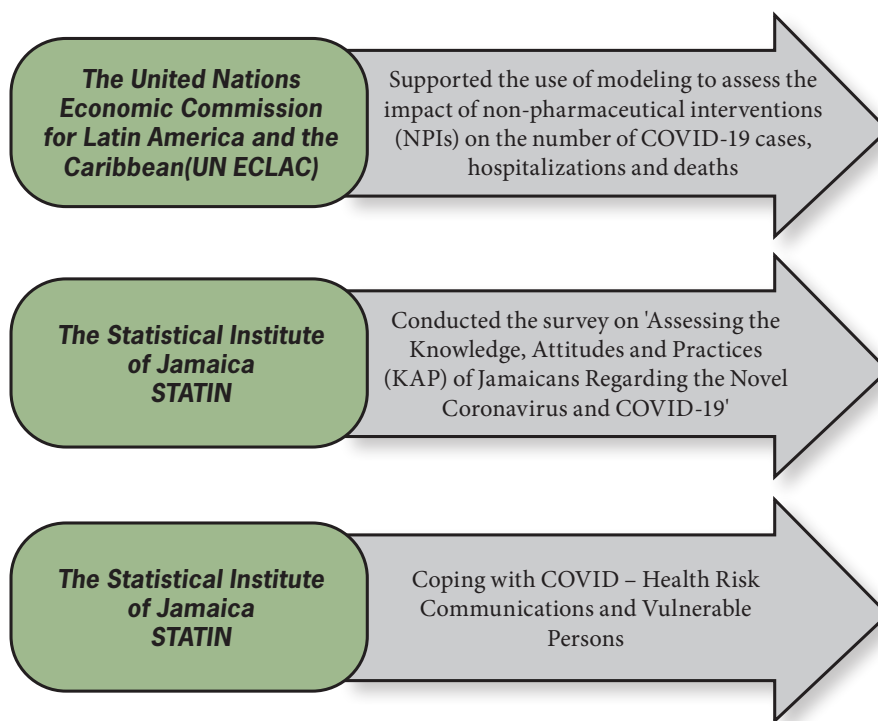
The Ministry hosted the 11th Annual National Health Research Conference in November 2020 under the theme, *The COVID-19 Experience: Adjusting to the New Normal*. The Conference was held virtually with over 1 000 participants during both Conference days, with an additional 16 500 views on social media.

HIV Response

The strategic/policy priorities for the HIV programme were guided by the National Integrated Strategic Plan (NISP) for Sexual and Reproductive Health 2014-2019. The NISP is consolidated around five priority areas with associated interventions/key actions and outcomes:

- Prevention and Sexual and Reproductive Health (SRH) Outreach
- Universal access to treatment, care and support and SRH services
- Enabling environment and human rights
- Monitoring and evaluation of HIV, family planning, and sexual health responses
- Sustainability, governance, and leadership.

There are an estimated 32 000 persons living with HIV, of which 41.0 per cent are on treatment. Approximately 86.0 per cent of the estimated number of PLHIV was diagnosed, 48.0 per cent retained in care on ARVs, and 71.0 per cent



virally suppressed. Due to the impact of the pandemic, several meetings and training sessions were held online and by telephone engagement to ensure safety of participants.

The MOHW reported that there was an increase in the incidence of mental health challenges (depression, anxiety, and traumatic stress disorders). In 2020 the MOHW provided assessment tools for identifying mental health issues among persons living with HIV, this was done in partnership with the Mental Health Unit to facilitate cross-referral of patients with HIV to attend the mental health clinics. According to UNAIDS, countries should consider the inclusion of mental health interventions in HIV strategies and programmes to reach the HIV 90-90-90 targets, and the HIV-related target of ending AIDS under goal three of the Sustainable Development Goals (SDGs).

Human Resource for Health

A competency needs assessment was conducted and competency gaps in human resource for health were identified. Arising from the gaps, 54 doctors received specialist training in the following areas: family medicine, paediatric medicine and surgery, urology, radiology, orthopaedic obstetrics/gynecology, ophthalmology haematology oncology cardio-thoracic surgery; accident and emergency; anaesthesia and intensive care, psychiatry, general surgery, internal and emergency medicine.

Additionally, 46 nurses were trained in neonatology; nephrology; and pediatrics; while 26 psychiatric enrolled assistant nurses were also placed in training programmes. To strengthen the health record management system,

100 health care workers were trained in data collection, morbidity and mortality coding, and basic health records management skills.

Environmental Health

Environmental health is important to the development and maintenance of sustainable, effective, and efficient delivery of environmental health services in Jamaica. The most outstanding achievement over the period was the training of an additional 1 000 Temporary Vector Control Aides to bolster the vector control programme islandwide. The MOHW in partnership with the community and key stakeholders collaborated to search and destroy breeding sites for the *Aedes Aegypti* mosquito.

A national surveillance system was also developed and is now fully operational. Data showed increased activities in most areas. Over seven million containers were inspected in 2020 compared with approximately five million in 2019 (Box 3).

BOX 3: COMPARATIVE Aedes Aegypti Summary, 2018–2020			
Parameters	2018	2019	2020
No. of Communities Inspected	2 818	9 926	14 902
No. of Premises Inspected	374 440	1 803 545	2 597 668
No. of Premises Positive	60 867	213 199	257 786
Premises Index	16.2 %	11.8%	9.9%
No. of Containers Inspected	1 047 297	5 337 733	7 025 656
No. of Containers Positive	135 433	475 641	503 844
Container Index	12.9 %	9.9%	7.2%
Note: The premises and container indices exceeded the WHO recommended standard of 5.0 per cent in 2020. However, the indices have trended down due primarily to increased community interventions.			

Child and Adolescent Mental Health

Mental health preparation for the COVID-19 pandemic began in January 2020, with the intense training of all health workers about the COVID infection, general infection prevention and control measures, and the development of protocols to govern the operation of all child guidance clinics (CGC). In July, CGC in the Kingston and St Andrew, MoEYI Guidance and Counselling Unit and UNICEF initiated a project whereby tele-mental health could be consistently delivered to the clients in the clinics. Fifty telephone handsets were purchased and distributed islandwide to practitioners in the CGCs with data plans supported for approximately nine months. The benefits which accrued from this initiative was a decrease in the number of children who default from clinic. This was also a preferred method of communication for adolescents. Younger children, however, did not fare so well with this

method of delivery and children with developmental disabilities longed for face-to-face interaction.

Compared with previous years there was a marked decrease in visits to the clinic. Compared with 2019, there was a 30.8 per cent decreased to 8 750 visits in 2020 (Box 4).

BOX 4: NUMBER OF CLIENT VISITS PER YEAR TO CHILD GUIDANCE CLINICS					
REGION	YEAR				
	2016	2017	2018	2019	2020
NERHA	1 425	2 021	2 550	2 611	2 060
SERHA	1 514	1 780	2 149	2 506	1 953
SRHA	3 762	7 184	7 408	4 752	4 309
WRHA	2 703	607	1 249	754	428
TOTAL	9 404	11 592	13 356	12 642	8 750

Emergency and Disaster Risk Management

The effects on the public health infrastructure by thunderstorms Eta and Zeta, which affected Jamaica in the latter part of 2020, underscored the importance of risk mitigation and multi-hazard response capacity in the health service delivery system. In accordance with Jamaica's shift in focus from managing disasters to managing risks, several programmed activities for risk mitigation in the public health service system were maintained during the period, in spite of the demands of the COVID-19 Response including:

- the continued implementation of the UKFCDO – PAHO Smart Health Care Facilities in the Caribbean Project with the launch of the infrastructure phase of the project in November 2020. This project will increase the resiliency of 15 prioritised public health facilities to increase the capacity for sustaining health service delivery during times of disasters
- the completion of one new Emergency Medical Services (EMS) site in St Ann. The infrastructure works component of the Tourism Enhancement Fund co-financed enhancement in medical emergency care in the northern and western parishes.

PARTNERS IN HEALTH CARE DELIVERY

National Council On Drug Abuse

The strategic priorities and programmes of the Agency are informed by national drug surveys and the priority programmes of the MOHW, which are to increase universal access to health; improve the quality of care; provide compassionate care.

There was a thrust to improve quality of care through

the development of standards of care for drug treatment, the creation of an Agency standard treatment protocol, and a resource manual. With the advent of the COVID-19 pandemic and the limited access to engage participants in prevention programmes in schools, communities, and workplaces, the presentations were digitized and switched to an online delivery utilizing social media platforms. The Agency added telephone counselling as another option for drug treatment. There were also additional personnel to conduct interventions through the training of school and public health care providers in screening, brief intervention, and referral to treatment (SBIRT) for problematic drug use.

Over 79 000 individuals through prevention and treatment interventions; 4 000 children through in-school drug prevention programme; and 983 clients remained in treatment for drug counselling. The MOHW also funded a peer-led Ganja Public Education campaign for high schools. The programme had three main components: the Operation Lighthouse Family; mass media; and a review of the campaign by the Ministry of Education Youth and Information. To date, 1 488 peer educators were trained; 121 adults and 129 children have been engaged in the family programme and 150 school personnel were engaged to participate in the review and make policy recommendations.

The “Tek it to Dem” programme continued to reach the homeless population who use drugs; female sex workers; men who have sex with men; transgender and the general population. A total of 1 347 persons were reached and another 1 207 were tested for HIV and syphilis.

Pan American Health Organization/World Health Organization (PAHO/WHO)

The PAHO operates in a number of countries in the region to improve and protect people’s health through technical cooperation to fight NCDs, strengthen health systems and response to disasters. Jamaica received technical support from PAHO/WHO in the establishment of a Health System Strengthening Project with an investment of US\$100.00 million over five years. The project aims to increase the capacity of selected health centres and hospitals to provide comprehensive health promotion, disease prevention, and treatment to meet the specific needs of individuals in the community through tailored infrastructure upgrades to facilities, linked information systems and developing standardized levels of care.

The pilot programme included 14 health facilities (11 primary health centres and three hospitals) located in a corridor between Ocho Rios, St Ann, and Lionel Town in Clarendon. Assistance provided to the COVID-19

response included:

- technical support and participatory guidance to the MOHW emergency Control Centre.
 - developing Strategies for suppressing transmission during community transmission
 - enhancing laboratory capacity
- training opportunities provided in Antigen Rapid Diagnostic Testing for 105 laboratory and other health personnel from the public and private sectors.
- supported the retrofitting of the isolation area at the Sangster International Airport and guidance on the public health measures to be taken at the points of entry in collaboration with PAHO, MOHW, and USAID
- provided 24-hour technical support and guidance to the EOC, including the twice-daily briefings.

OUTLOOK

Jamaica established a core committee within the MOHW to draft an Interim Vaccination Plan in anticipation of starting vaccination with approved COVID-19 vaccines. The plan will be established using 11 Operational Components to attain efficient and adequate population coverage. The components include: organization and coordination; planning and microplanning; training; vaccines safety and surveillance; process monitoring; human resources; research; waste management; demand generation and communication. An online appointment system will be proposed and operation will be scheduled for both weekdays and weekends. The vaccines expected to be purchased based on availability include Astrazeneca (SK), AstraZeneca (SI), Johnson and Johnson, and Moderna.

It is expected that there will be loss in some of the gains made in achieving the local and global HIV targets because of the impact of the pandemic on service delivery. To recover the gains lost, the national HIV programme will seek to develop and implement strategies to improve linkage to care, retention in care, and adherence to treatment. The strategies such as the delivery of HIV treatment services outside of treatment sites, an increase in the capacity of the delivery of psycho-social care and the implementation of an enhanced package of care for key and vulnerable populations will be explored.

There will be an evaluation of the 2013–2018 National Strategic Plan (NSP) for NCDs and development of the 2022–2026 NSP. A part of the roadmap for mitigating the impact of NCDs in Jamaica will include the establishment of a National Commission on Non-Communicable Diseases. The commission will provide overall strategic direction and guidance to the MOHW and all stakeholders on matters pertaining to prevention and control of NCDs.

There will also be the development of a plan for the elimination of cervical cancer, as well as the establishment of a childhood Cancer Technical Working.

The MOHW will develop a Ten-Year Survey Plan as part of a wider initiative to improve the governance framework for research on health. This draft plan will be aligned with

Vision 2030 Jamaica – National Development Plan. The plan will help to regulate the timing of and funding for key surveys being supported at the national level, to ensure timely accurate health data that can guide policies and programmes. A prioritization process will select the top 10 surveys which will be submitted to Cabinet for approval. ■

NATIONAL SECURITY AND JUSTICE

INTRODUCTION

The attainment of a Jamaican society that is safe, cohesive and just as per Goal 2 of the Vision 2030 Jamaica – National Development Plan continued to be the main driver for policies, projects and programmes undertaken during the year. The government continued its multifaceted approach to improve the levels of safety and security. The approach included social interventions, enhanced security measures, improved physical and technological architecture of the security forces and ensuring an effective legislative programme. In the area of social intervention, a number of initiatives were implemented, targeting at-risk individuals and communities. The Citizen Security Secretariat was established in October and will oversee the implementation of the Citizen Security Plan, which is an element of Plan Secure Jamaica. The Citizens Security and Justice Programme III ended, however elements of the programme were transitioned into other government entities. The government continued to maintain Zones of Special Operations in four communities and States of Emergency (SOEs) in five police divisions as part on the enhanced security measures. The SOEs came to an end on August 17 when the national elections were announced. The technological capacity of the security forces was increased with the further expansion of JamaicaEye, strengthening of the Jamaica Constabulary Force communication network and the development of the traffic ticketing system. Work also continued on the improvement of police stations and other police facilities.

Work in the security and justice sectors was made even more challenging with the onset of the coronavirus disease 2019 (COVID-19), as the security forces played a critical role in enforcing the COVID-19 measures under the Disaster Risk Management Act. Additionally, the regulations under the Act placed restrictions on large public gatherings, which affected the implementation of some programmes that were scheduled to be undertaken.

Nonetheless, the crime rate declined by 5.6 per cent.

As the government managed the spread of COVID-19, there were changes to operations in the courts such as temporary closures, a reduction in numbers as part of physical distancing and the halting of night courts due to curfews. In spite of this, the case backlog rate continued to decline as courtrooms were outfitted with audio-visual equipment to facilitate cases being heard remotely. Work on the improvement of the physical infrastructure, as well as the information and communication technology (ICT) capacity of courts islandwide continued. Four additional child diversion centres were established, bringing to 13 the number of centres in operation.

FINANCING

The approved budget for the Ministry of National Security (MNS) and its departments and agencies¹ was approximately \$92.6 billion net of Appropriations-in-Aid (Table 24.1A). This was approximately 2.5 per cent less than the revised sum for the 2019/20 fiscal year (FY) and 10.9 per cent of the government's \$852.7 billion budget for FY 2020/21.² The MNS and its departments and agencies continued to receive the third largest allotment—after the Ministry of Finance and the Public Service, and Ministry of Education, Youth and Information (MOEYI). Over half of the allocation, 51.5 per cent, went to the Jamaica Constabulary Force (JCF), followed by the Jamaica Defence Force (JDF), with 36.1 per cent.³

The Capital allocation⁴ was almost \$16.0 billion (net of Appropriations-in-Aid), of which 97.5 per cent was funded by the Government of Jamaica (GOJ), with the balance funded by the Inter-American Development Bank (IDB) for the implementation of the Security Strengthening Project. The government-funded portion of the Capital budget was primarily used to procure various modes of transportation; construct and rehabilitate physical infrastructure, especially police stations; and acquire cyber

1. Does not include the Passport, Immigration and Citizenship Agency and the Institute of Forensic Science and Legal Medicine.
2. The ministry received 11.1 per cent of the \$859.1 billion budget in FY 2019/20.
3. The percentages were calculated using the total budget including Appropriations-in-Aid.
4. The Capital A and B allocation were combined into the Capital allocation.

TABLE 24.1A
MINISTRY OF NATIONAL SECURITY RECURRENT AND CAPITAL BUDGET BY FUNCTION 2019/20 – 2020/21
 (\$'000)

RECURRENT	REVISED ESTIMATE 2019/20	APPROVED ESTIMATE 2020/21	PERCENTAGE CHANGE 19/20 – 20/21
Ministry of National Security	2 333 321	2 589 083	11.0
Jamaica Defence Force	24 688 755	24 649 099	-0.2
Jamaica Constabulary Force	41 212 164	41 952 749	1.8
Department of Correctional Services	7 899 526	8 477 865	7.3
Sub-total	76 133 766	77 668 796	2.0
Less Appropriation-in-Aid	1 078 101	1 042 095	-3.3
Total	75 055 660	76 626 701	2.1
CAPITAL			
Jamaica Defence Force	12 569 794	9 114 556	-27.5
Jamaica Constabulary Force	7 202 957	6 295 284	-12.6
Department of Correctional Services	297 123	544 000	83.1
Ministry of National Security	0	0	0.0
Sub-total	20 429 749	15 953 840	-21.9
Less Appropriation-in-Aid	200 000	0	-100.0
Total	19 869 874	15 953 840	-19.7
GRAND TOTAL	94 925 534	92 580 541	-2.5

Source: Estimates of Expenditure 2020/2021 – For the financial year ending March 31, 2021

TABLE 24.1B
MINISTRY OF JUSTICE RECURRENT AND CAPITAL BUDGET BY FUNCTION 2019/20 – 2020\21
 (\$'000)

RECURRENT	REVISED ESTIMATE 2019/20	APPROVED ESTIMATE 2020/21	PERCENTAGE CHANGE 19/20 – 20/21
Ministry of Justice	2 156 747	2 328 797	8.0
Director of Public Prosecution ^a	563 129	526 052	-6.6
Administrator General	542 177	596 389	10.0
Attorney General	1 031 846	1 173 197	13.7
Office of Parliamentary Counsel	173 892	183 020	5.3
Legal Reform Department	96 405	101 178	5.0
Judiciary ^{b & c}	4 348 842	4 614 163	6.1
Sub-total	8 913 038	9 522 796	6.8
Less Appropriation-in-Aid	375 597	401 688	7.0
Total	8 555 441	9 121 108	6.6
CAPITAL			
Ministry of Justice	1 077 366	941 500	-12.6
GRAND TOTAL	9 632 807	10 062 608	4.5

a – Figures include \$10.1 million mandated by law

b – Figures include \$785.962 million mandated by law

c – Includes the Court Management Services, Court of Appeal and the Supreme, Parish, Family and Revenue Courts

Source: Estimates of Expenditure 2020/2021 – For the financial year ending March 31, 2021

security and telecommunications equipment. There was also \$232.8 million in local counterpart funding for the Citizens' Security and Justice Project (CSJP) III.⁵

The Ministry of Justice and its departments and agencies was allotted \$10.1 billion, 4.5 per cent more than in FY 2019/20 and 1.2 per cent of the total budget.⁶ The Judiciary, which encompasses the Court Management Services, Court of Appeal and the Supreme, Parish, Family and Revenue Courts received the largest share of 44.1 per cent, followed by the central administration of the MOJ with 31.3 per cent⁷ (Table 24.1B). The GOJ funded 75.3 per cent of the approximately \$941.5 million Capital budget. The GOJ allocation was used to fund the implementation of the Justice Sector Reform Programme and more specifically improvements to a number of family courts islandwide, as well as to commence work for the establishment of three regional court complexes (Manchester, St Ann & St James) and a parish court in St Catherine. The remainder of the Capital budget was used to finance the justice component of the CSJP III. The GOJ funded 55.8 per cent of the CSJP allocation as local counterpart financing as per project agreement. The remaining 44.2 per cent was funded by the Foreign, Commonwealth and Development Office; Global Affairs Canada; and IDB. The activities under this component included the establishment of four additional child diversion centres and the retrofitting of areas to accommodate four victim service centres.

NATIONAL SECURITY

The MNS and its portfolio entities—including the JCF, JDF, DCS, Institute of Forensic Science and Legal Medicine, Major Organized Crime and Anticorruption Agency (MOCA), Passport, Immigration and Citizenship Agency, Police Civilian Oversight Authority and the Private Security Regulation Authority—are responsible for the administration of national security in Jamaica. The work of these entities is supported by the implementation of a number of sector specific social intervention programmes (see chapter on Social Development).

Ministry of National Security

The capital budget for the MNS and its portfolio entities was reduced by 60.0 per cent as the government channelled much needed resources into the management of the COVID-19 pandemic. This led to a review of projects and programmes that were slated for implementation during the period.

The government has adopted a comprehensive all-of-government approach to implementing *crime prevention and community safety* programmes in communities islandwide. To this end, the Cabinet granted approval by way of Decision No. CO 24/20 dated May 4, 2020 for the implementation of the Citizen Security Plan (CSP). The Plan has three prioritized outcomes: crime and violence reduction; safer spaces; and human and community development. The CSP will support and build on the existing work being undertaken to improve citizen security by a number of ministries, departments and agencies (MDAs) and other stakeholder groups, to ensure greater coherence and effectiveness. The Citizen Security Secretariat was officially established on October 1 to manage the implementation of the CSP. The Secretariat will liaise directly with the implementing agencies to foster accountability and effective coordination on the ground in the top 20 at-risk communities across the country.

The Targeted Approach for Youth Violence Prevention Framework was being implemented in 25 selected schools (primary and secondary), with 669 of 1 068 students engaged for behaviour and risk-to-violence assessment, supported by case management methodology adopted from Citizen Security and Justice Programme (CSJP) Phase III. A needs assessment was conducted for 13 of the 25 prioritized schools to inform the design of school-based support responses to enhance teacher/student relationship, teacher welfare options and behavioural and remedial learning interventions. Partnerships were established for delivery of music, sports and technology programmes in selected schools; however, implementation was stalled due to physical closure of schools on account of the COVID-19 pandemic. A total of 354 students in Grade 6 from six primary schools were engaged in the Academic Remedial and Psychosocial Support Summer Camp hosted by the St Andrew South Police Division. The camp was held to support the transition from primary to secondary school. Students were provided with back-to-school supplies from the Jamaica Diaspora Taskforce Action Network (JDTAN). There were 3 900 Household Service Needs Assessments conducted in St Andrew South (follow-up to summer school) and six communities in St James (Norwood, Salt Spring, Mount Salem, Canterbury, Flanker and Rose Heights).

The case management function of the *Citizen Security and Justice Programme III* (CSJP III) was transitioned into the Crime Prevention and Community Safety Branch of the MNS and 18 case managers were engaged. Training was provided to selected case managers to build

5. All international funding requirements for the security component of the project had been completed prior to 2020.

6. In FY 2019/20 it was 1.1 per cent of the \$859.1 billion budget.

7. The percentages were calculated using the total budget including Appropriations-in-Aid.

their capacity to effectively deal with a younger cohort of at-risk clients aged 8–15 years, who have been prioritized for interventions. A database management system was established to support case management processes and operations.

All activities under Component 1 of the CSJP III were closed out as at November 30, as the programme came to an end on December 11. All physical infrastructure projects were completed. These included: renovation and expansion of the Gayle Multipurpose Centre; renovation and other works for the Victim Services offices in Port Maria, St Mary and Spanish Town, St Catherine; renovation works for the Restorative Justice (RJ) offices in Port Maria, St Ann, Portland and August Town. The remaining activities under pre-vocational and vocational skills training continued, based on a transition arrangement with HEART/NSTA Trust. Under the Agreement, 175 participants were engaged in a three-month job certification-training programme: 70 in Montego Bay and 105 in the Kingston Metropolitan Area. Training was conducted using a blended approach of virtual and face-to-face classes/sessions and is scheduled to end mid-February 2021.

As it relates to support of the Government's Restorative Justice programme, 161 case conferences were held with 1 004 participants (563 females), which resulted in 199 agreements. In addition, 111 sensitization sessions were conducted with 1 498 persons (856 females). The CSJP III also provided support, by way of grants, to victims of violence and, during the period, 45 grants were disbursed through the Victim Services Division of the MOJ.

Work continued to support the *rehabilitation and reintegration of involuntary returned migrants* (IRMs), with the completion of the revised draft National Deportation Policy, the Rehabilitation and Reintegration Strategy for IRMs and relevant standard operating procedures. These documents will be submitted to the Cabinet for final adoption in 2021. A training workshop was held with Poor Relief staff at the Local Authorities to improve their service delivery to IRMs. Educational material for the Help Desk in the Local Authorities was also drafted and submitted to the Ministry of Local Government and Rural Development.

Assistance to vulnerable persons under the Foreign and Commonwealth Development Office-funded, *Responding to COVID-19 in the Caribbean Project*. Activity 1 saw support being provided to Woman Incorporated, a non-governmental organization for psychosocial programmes that offer temporary relief to vulnerable families and direct access to services that respond to the threat of domestic violence. The following was accomplished:

- completion of minor renovation on the emergency shelter and transitional living facility
- procurement of household appliances, furniture, office equipment and supplies for the transitional living facility
- launch of a social media campaign

- provision of assistance, including care packages and/or medical assistance to 237 clients
- conducting of capacity-building sessions for case workers and hotline responders, and
- recruitment of four social workers to provide psychosocial support to clients.

Activity 2 provided support to the Peace Management Initiative for its violence interrupters programme. A total of 40 violence interrupters (VIs) were hired to support 30 targeted communities in the parishes of Kingston, St Andrew, Hanover, and Westmoreland, while psychosocial and livelihood support was provided to 280 clients. Activity 3 provided support to the MNS' Targeted Youth Violence Prevention in Schools and Communities and 234 Household Service Needs Assessments were completed for referral to the relevant MDAs for processing.

The *MNS/Crime Stop/JCF Rewards for Guns Campaign* continued and, during the review period, 42 illegal firearms and 472 rounds of ammunition were recovered and 10 persons arrested for illegal possession of firearms and/or ammunition. Approximately \$4.8 million was paid in rewards for seizures and/or arrests for illegal possession of firearms and ammunition.

Implementation of the *We Transform Programme* continued. During the year, 38 new mentors were added to the database. However, limitations imposed by the COVID-19 pandemic resulted in only a few being actively engaged in mentoring sessions. Throughout the period, 32 persons served as mentors within three juvenile centres and in one-on-one pairings with youth leaving the juvenile centres. A total of 60 children were engaged using a group approach and another 12 in one-to-one pairings under the following thematic areas: career/personal development; entrepreneurship; counselling; behaviour modification; and academics, to include reading, numeracy, and literacy. Additionally, 23 persons were trained as mentors by the HEART/NSTA Trust, while 32 applicants were security vetted by the National Intelligence Bureau of the JCF and 10 vetted by the Sex Offender Registry.

Youth leaving the juvenile facilities have been targeted for the provision of support in areas of internship and job placement. Two former youth offenders, who were placed in 2019, were still employed on a contractual basis while another two started their internship at the MNS. The programme procured desktop computers, laptops, tablet computers, web cameras and microphones to support rehabilitation processes such as court sessions, mentorship programme, psychosocial interventions, and academic programmes with support from the United Nations Children's Fund (UNICEF).

A number of psychosocial interventions were undertaken across the juvenile centres in support of the general programming of the DCS and as an

emergency response to psychosocial issues brought on by the COVID-19 pandemic. In addition to the regular cognitive behavioural therapy programme, parent–child bond sessions were held. This provided wards with an opportunity to connect with their parents, whom they had not seen for months due to restrictions on visits to the institutions. A total of 110 wards benefited from the intervention. Wards also participated in relaxation therapy geared toward developing their mental health, as well as improving their acceptance-oriented approach to challenges/crises. Through art therapy, boys at select locations were involved in the design of murals within the juvenile centres.

In the area of *Offender Management and Parole*, work began with the recruitment of a consultant to review for amendment, the Corrections Act (1985) and prepare a draft policy proposal. The amendment of the Act will ensure that the local legislation reflects international best practices. Cabinet approval was received for the development of a comprehensive National Offender Management Policy. In response to the restrictions due to the onset of the COVID-19 pandemic, the Parole Board shifted to virtual meetings and nine Board hearings were convened. A total of 79 applications were submitted for the Board’s consideration and of this number, 45 were granted parole, 27 refused and seven deferred. Another nine parolees were recommended to the Governor General for reprieve.

As it relates to *Protective Security and Small Arms*, work on the amendment of the Firearms Act, 1967 continued and in December, a policy decision was taken to repeal and replace the Act, given the extensive amendments that were proposed to the principal legislation. With regards to the adoption and implementation of the Roadmap for the Caribbean Priority Actions on the Illicit Firearms and Ammunition across the Caribbean in a sustainable manner by 2030, technical assistance to support the implementation of a national component was received from the United Nations Regional Centre for Peace, Disarmament and Development in Latin America and the Caribbean. An inventory was conducted of 1 904 firearms, 11 679 assorted firearm parts (magazines) and 268 259 assorted rounds of ammunition within state facilities as part of physical security and stockpile management (PSSM) activities. A total of 16 law enforcement, licensing and policy officials benefited from sensitization on PSSM good practices. Another 25 persons benefited from the two Arms Trade Treaty (ATT) national workshops that were held. In an effort to increase regulation of the firearm industry, the Firearm Licensing Authority (FLA) acquired firearm marking equipment to enable the identification of civilian firearms, which will enhance the government’s capacity to trace illicitly trafficked firearms. A regional office for the

FLA was established in St Ann, while a regional office for the Private Security Regulation Authority was established in St James to improve access to clients of both agencies.

Work in *Law Enforcement, Forensics and Defence* focussed on the amendments to the Criminal Justice (Suppression of Criminal Organizations) Act, 2013 (anti-gang legislation) and the Major Organized Crime and Anti-Corruption Agency (MOCA) Act, 2018. The Anti-gang Legislation is being amended to incorporate the adjustments proposed to the legislation by the Joint Select Committee of Parliament; and to address issues affecting operational effectiveness. Amendments to the MOCA legislation included the removal of the Agency’s body corporate status and other matters. Preparation of the regulations for MOCA that will accompany the MOCA legislation was being developed to provide for effective guidance to and accountability of MOCA officers in the conduct of their duties.

The country maintained a Tier 2 (Upper) ranking in the United States Department of State 2020 *Trafficking in Persons* (TIP) Report. Through the National Task Force Against Trafficking in Persons (NATFATIP), the GOJ continued its counter TIP efforts in the areas of prevention, protection, prosecution, policy and partnership. During the period, one person was convicted for trafficking in persons. Eight victims of human trafficking were identified. The victims were offered specialised services such as medical care, accommodation, counselling/psychosocial support, legal services, immigration assistance and reintegration support. In addition, one victim from a previous reporting period was granted Jamaican citizenship. Three webinars on human trafficking, child labour, sexual offences and cyber-crimes were held with members of the A-TIP clubs in secondary schools and the general public—there were 150 participants. Additionally, six virtual training sessions were conducted with 250 police officers. NATFATIP also collaborated with VP Records to launch the “No Shadows after Dark” song and campaign. Additionally, an animated video was created to help raise awareness on human trafficking.

Work continued on the development of the National Border Security Policy and Strategy, the draft Deportation Policy and the National Visa Policy as part of the focus for *Border Protection*. Support was provided to the Passport, Immigration and Citizenship Agency to, among other things: maintain the Jamaica Passport Issuing and Control System and acquire an additional 50 automated border control kiosks for the Sangster and Norman Manley International Airports.

Given the increased use of technology, *cybersecurity* is critical to Jamaica’s national security interests. To this end, a new policy unit was established. with the mandate of improving cyber intelligence and incident response.

Implementation of *technology and infrastructure projects* to advance the public order and safety agenda continued. The National Surveillance Programme, JamaicaEye, was further expanded with camera installations in Kingston, Spanish Town, Santa Cruz and Black River. The video storage and video processing capacity was increased to accommodate an additional 1 000 cameras. Sensitization and information sessions were held with various businesses, community groups and business associations to initiate the establishment of video sharing partnerships. One partnership agreement was established with a major private sector group for the contribution of their CCTV camera feeds to the JamaicaEye. The video analytics software was also enhanced with the addition of automated licence plate recognition (ALPR) capability.

The upgrade and expansion of the JCF's communications network will enable the police to gather and share vital information on/from crime, and criminal and intelligence operations on a larger scale to improve law enforcement services provided to the community. The MNS is expanding the JCF's communication networks, that is, the P25 Radio Network (voice) and the Microwave Network (data). Some 83.3 per cent (10 of 12) of the existing P25 Radio Network sites have been upgraded, while an assessment of radio network expansion options to deliver 95.0 per cent coverage islandwide was completed. In addition, site surveys for an additional 79 police facilities to be connected to the data communications network was completed.

The MNS assumed ownership of the Traffic Ticket Management System (TTMS) and has developed and tested a handheld traffic ticketing solution to replace the manual, paper-based ticketing process. An online portal was also developed to provide citizens with online access to their traffic ticket status and history.

The renovation and construction of police facilities and other buildings continued under Project Rebuild, Overhaul and Construct (P-ROC). This arose out of a 2019 assessment of the physical state of the 213 police stations/facilities—comprising 186 stations and 27 facilities— islandwide. The assessment showed that approximately 70.0 per cent had deteriorated and were in advanced states of disrepair. In excess of 200 JCF facilities are being targeted under the project. During the period, renovation work was completed at 14 police stations. An additional floor was constructed at the Caribbean Regional Drug Law Enforcement Training Centre (REDTRAC). The addition will provide space for additional classrooms and offices. The infrastructural capacity at REDTRAC has remained unchanged for over the last two decades since its opening in 1996. Pre-construction work continued for the government-owned Autopsy Suite and the divisional headquarters for the

Westmoreland and St Catherine North police divisions.

The need to demonstrate the efficacy of initiatives post implementation guided the ministry's *research and evaluation* agenda. The process of classifying Jamaica's criminal code against the International Classification of Crime for Statistical Purposes continued and nine of the 11 categories has been completed. The final report for the Jamaica National Crime Victimization Survey (JNCVS) 2019 was completed. Work also commenced on the following:

- Reliability Study of JCF Fleet of Vehicles – to inform the standardization of JCF fleet by identifying fit-for-purpose vehicles and, to assist in the acquisition and distribution of vehicles.
- Community Liaison Aides Project Household Survey – to investigate the needs of the households within six communities in Montego Bay, St James to link residents to social, psychological and employability skills development services.
- Project R.O.C Baseline Assessment Survey – to assess the perception of police officers in relation to their physical work environment, as well as that of the citizens served by newly constructed or renovated police stations.
- We Transform Programme Phase 1 Evaluation and Phase 2 Baseline Assessment – to assess the efficacy of the programme in fulfilling its objective, as a means for comparison, measuring success, assessing efficacy and providing recommendations for improvement.
- National Surveillance Programme (JamaicaEye) – Baseline Assessment, Evaluation Report and Monitoring and Evaluation Framework
- CCTV Township installation for Santa Cruz and Black River Baseline Assessment Report.

Jamaica Constabulary Force

Personnel

The strength of the **Jamaica Constabulary Force (JCF)** decreased by 0.9 per cent from 11 890 in 2019 to 11 778 and as a result, operated at 16.4 per cent below the establishment size.⁸ The JCF operated at 15.6 per cent and 16.3 per cent below establishment size in 2019 and 2018, respectively. Of the 11 778 active members, 77.2 per cent was male (Table 24.2). A total of 156 persons (127 male) joined the force while 262 officers left the force. Retirement (47.3 per cent) and resignation (34.7 per cent) continued to be the main reasons for attrition in the JCF. Seven police officers were killed in the line of duty. The onset of the COVID-19 pandemic had an impact on a number of

8. JCF Establishment size is 14 091.

TABLE 24.2
ESTABLISHMENT AND STRENGTH OF THE JAMAICA CONSTABULARY FORCE
AS AT DECEMBER 31, 2020

	ESTABLISHMENT		STRENGTH		Total
			Male	Female	
Commissioner	1		1	0	1
Deputy Commissioner	5		4	0	4
Assistant Commissioner	19		13	0	13
Senior Superintendent	42		20	8	28
Superintendent	86		50	21	71
Deputy Superintendent	199		133	63	196
Assistant Superintendent	130		15	5	20
Inspector	572		349	184	533
Sergeant	1 626		1 004	442	1 446
Corporal	2 508		1 712	559	2 271
Constable	8 903		5 790	1 405	7 195
TOTAL	14 091		9 091	2 687	11 778

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

TABLE 24.3
TOTAL CRIMES REPORTED AND CLEARED UP, 2016–2020

CRIME CATEGORY	2016		2017		2018		2019		2020		Percentage Change	
	Reported	Cleared Up	Reported	Cleared Up	Reported	Cleared Up	Reported	Cleared Up	Reported	Cleared Up	Reported	Cleared Up
Murder	1 351	488	1 644	530	1 287	658	1 339	335	1 323	648	-1.2	93.4
Shooting	1 219	371	1 481	445	1 155	463	1 253	319	1 276	432	1.8	35.4
Rape	484	191	469	207	450	289	547	233	481	341	-12.1	46.4
Aggravated Assault ^a	459	331	421	310	375	270	392	266	405	306	3.3	15.0
Robbery	1 422	360	1 267	323	1 090	325	1 217	278	996	243	-18.2	-12.6
Break-in	1 277	289	1 187	376	1 166	363	1 242	335	1 021	305	-17.8	-9.0
Category 1 Larceny	187	89	140	76	152	81	143	64	97	46	-32.2	-28.1
Arson	94	27	125	49	111	21	41	15	47	26	15.4	73.3
Assault	2 718	2 114	2 651	2 202	2 500	2 150	2 365	1 891	2 412	1 867	2.0	-1.3
Breaches of the Dangerous Drugs Act	1 410	1 395	1 226	1 194	1 049	1 033	1 024	997	881	866	-14.0	-13.1
Breaches of the Firearms Act	1 102	1 056	1 329	1 253	1 324	1 404	1 244	1 189	1 237	1 301	-0.6	9.4
Breaches of the Immigration Act	1	1	4	4	1	2	2	2	0	0	-100.0	-100.0
Breaches of the Law Reform Fraudulent Transaction Act	229	228	147	146	273	267	274	267	229	225	-16.4	-15.7
Cybercrime	49	19	28	11	25	16	15	11	22	17	46.7	54.6
Fraud	306	248	210	186	166	176	221	184	190	183	-14.0	-0.5
Manslaughter	4	3	3	1	2	4	2	2	3	3	50.0	50.0
Other Larceny	587	324	492	285	453	294	793	286	745	280	-6.1	-2.1
Praedial Larceny	117	57	112	61	78	45	71	44	62	34	-12.7	-22.7
Sexual Intercourse/Under 16	444	217	564	232	464	302	599	271	527	355	-12.0	31.0
Sexual Offence	360	200	454	270	389	321	456	289	527	415	15.6	43.6
Offensive Weapon	983	993	1 102	1 128	549	546	669	661	358	355	-46.5	-46.3
Receiving Stolen Property	91	129	86	111	75	74	89	85	56	61	-37.1	-28.2
Unlawful Possession of Property	77	102	58	65	40	41	39	39	40	39	2.6	0.0
Others	3 555	3 223	3 251	2 979	3 178	2 665	3 140	2 594	3 138	2 573	-0.1	-0.8
Grand Total	20 047	12 914	18 451	12 444	16 352	11 810	17 177	10 657	16 218	10 921	-5.6	2.5

a – Aggravated assault crime category included the following offences: Felonious Wounding, Assault Occasioning Grievous Bodily Harm, and Wounding with Intent (does not include a gunshot wound)

Note that crimes cleared up includes crimes committed in previous years.

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

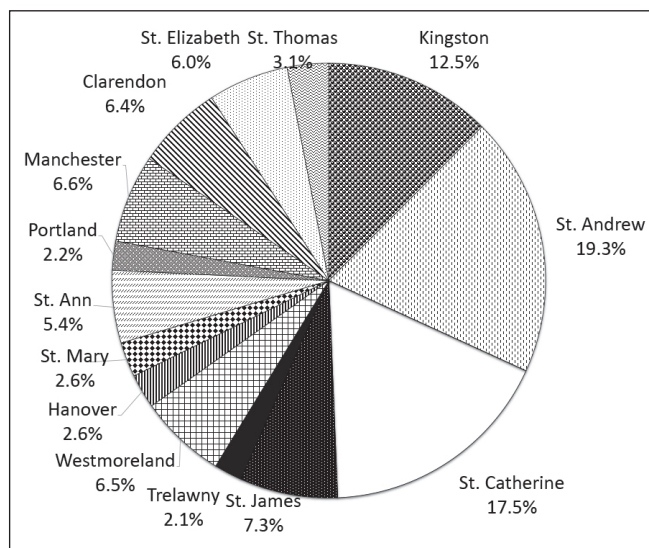


FIGURE 24A: PERCENTAGE DISTRIBUTION OF CATEGORY 1 CRIMES BY PARISH, 2020

functions including the enlistment of new recruits, which declined by 77.6 per cent. The cadre of District Constables stood at 2 159 persons (64.2 per cent male), which was 43.7 per cent above the establishment size of 1 502.

Total Crimes

Total number of reported crimes decreased by 5.6 per cent from 17 177 in 2019 to 16 218. This is the lowest figure recorded over the five-year period, 2016 to 2020 (Table 24.3). Thus, the overall crime rate declined from 628 per 100 000 to 593 per 100 000. At the same, there was a 2.5 per cent increase in the number of crimes cleared up.⁹

The reduction in five of the seven categories resulted in an 8.7 per cent decline in the number of reported **Category 1 crimes**.¹⁰ Murders decreased by 1.2 per cent; rape 12.1 per cent; robbery 18.2 per cent; break-in 17.8 per cent; and category 1 larceny 32.2 per cent. However, the Category 1 crime rate remained at 224 per 100 000, due to an increase in the population projections for 2020. As in previous years, approximately one-fifth of the crimes occurred in the parish of St Andrew (Figure 24A). There was a reduction in the number of Category 1 crimes reported in nine of the 14 parishes (Table 24.4). The reductions ranged from 0.9 per cent in St Elizabeth to 31.6 per cent in St Thomas. Conversely, the number of crimes reported in the parish of Portland increased by 51.3 per cent. The total number

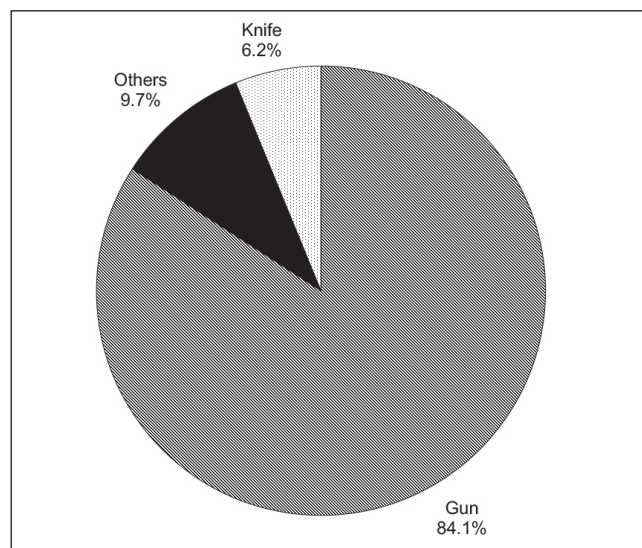


FIGURE 24B: PERCENTAGE DISTRIBUTION OF TYPE OF IMPLEMENT USED IN MURDER, 2020

of reported cases of rape declined by 12.1 per cent, however, the number of reported cases increased to 17 from 9 in St Ann and to 15 from 8 in Portland.

The 1.2 per cent reduction in the number of **murders** resulted in a decline in the murder rate from 49 per 100 000 in 2019 to 48 per 100 000. The number of females and children murdered went down by 10.3 per cent and 40.0 per cent, respectively. Firearms continued to be the main weapon used to commit murders, at 84.1 per cent (Figure 24B). There were 497 gang-related murders, 262 non-gang related and 42 domestic murders (eight more than in 2019), while the motive for another 513 was unknown. The parishes of St James, St Catherine, St Andrew, Clarendon and Kingston continued to account for approximately 75.0 per cent of murders.

There were 101 victims of **fatal shootings**,¹¹ two fewer than in the previous year: 77 were by the police; 14 by licensed firearm holders; eight by soldiers; and two by armed security guards. During the period, 623 firearms and 8 773 rounds of ammunition were seized.

There was a 2.4 per cent reduction in the total number of persons arrested, from 13 144 to 12 824. **Arrests** for Category 1 crimes accounted for 20.7 per cent of those arrested. Males continued to be the main perpetrators of crime as, of the 2 651 persons arrested, 98.0 per cent was male (Table 24.5). There was a reduction in the share of

9. Cleared up means that a charge has been laid against an individual for committing an offence and not that the case has gone before the courts.

10. Category 1 crimes are major crimes and include murder, shooting, rape, aggravated assault, robbery, break-in and larceny.

11. Fatal shootings are shootings by persons licensed to carry a firearm and includes police officers, soldiers, specific security guards and private licensed firearm holders.

TABLE 24.4
CATEGORY 1 CRIMES BY PARISH, 2019 vs 2020

Parish	Murder		Shooting		Rape		Aggravated Assault		Robbery		Break-In		Larceny		Grand Total									
	2019	2020	Change (%)	2019	2020	Change (%)	2019	2020	Change (%)	2019	2020	Change (%)	2019	2020	Change (%)	2019	2020							
Kingston	182	221	21.4	191	239	25.1	54	41	-24.1	40	47	17.5	124	95	-23.4	55	31	-43.6	26	25	-3.8	672	699	4.0
St Andrew	341	301	-11.7	313	310	-1.0	140	107	-23.6	43	22	-48.8	295	212	-28.1	147	115	-21.8	38	15	-60.5	1317	1082	-17.8
St Catherine	208	240	15.4	207	223	7.7	99	75	-24.2	27	36	33.3	227	253	11.5	155	144	-7.1	15	11	-26.7	938	982	4.7
St James	153	127	-17.0	130	137	5.4	44	28	-36.4	17	22	29.4	73	56	-23.3	66	37	-43.9	5	3	-40.0	488	410	-16.0
Trelawny	30	21	-30.0	20	13	-35.0	11	15	36.4	21	29	38.1	19	9	-52.6	61	28	-54.1	4	1	-75.0	166	116	-30.1
Westmoreland	89	77	-13.5	100	86	-14.0	36	44	22.2	33	34	3.0	90	61	-32.2	76	54	-28.9	12	7	-41.7	436	363	-16.7
Hanover	32	33	3.1	23	32	39.1	17	24	41.2	7	10	42.9	9	9	0.0	27	31	14.8	2	4	100.0	117	143	22.2
St Mary	21	31	47.6	18	19	5.6	19	24	26.3	21	23	9.5	37	20	-45.9	33	27	-18.2	5	1	-80.0	154	145	-5.8
St Ann	52	70	34.6	42	45	7.1	9	17	88.9	18	32	77.8	77	61	-20.8	86	72	-16.3	9	5	-44.4	293	302	3.1
Portland	10	10	0.0	8	11	37.5	8	15	87.5	20	32	60.0	5	8	60.0	25	39	56.0	4	6	50.0	80	121	51.3
Manchester	45	33	-26.7	56	35	-37.5	34	10	-70.6	40	45	12.5	101	74	-26.7	197	156	-20.8	8	14	75.0	481	367	-23.7
Clarendon	118	106	-10.2	82	72	-12.2	28	31	10.7	38	15	-60.5	54	51	-5.6	74	80	8.1	5	5	0.0	399	360	-9.8
St Elizabeth	27	27	0.0	25	30	20.0	23	21	-8.7	30	40	33.3	76	71	-6.6	150	147	-2.0	8	0	-100.0	339	336	-0.9
St Thomas	31	26	-16.1	38	24	-36.8	25	29	16	37	18	-51.4	30	16	-46.7	90	60	-33.3	2	0	-100.0	253	173	-31.6
Grand Total	1 339	1 323	-1.2	1 253	1 276	1.8	547	481	-12.1	392	405	3.3	1 217	996	-18.2	1 242	1 021	-17.8	143	97	-32.2	6 133	5 599	-8.7

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

TABLE 24.5
AGE GROUP AND SEX OF PERSONS ARRESTED FOR CATEGORY 1 CRIMES, 2020^a

AGE GROUP	MURDER		SHOOTING		ROBBERY		BREAK-IN		LARCENY		RAPE	AGGRAVATED ASSAULT		TOTAL BY SEX		GRAND TOTAL
	M	F	M	F	M	F	M	F	M	F		M	F	M	F	
12-14	2	1	2	0	2	1	13	2	1	0	19	2	0	41	4	45
15-17	21	0	19	1	22	2	29	1	5	0	39	17	1	152	4	156
18-24	234	4	190	2	117	0	88	2	16	1	63	67	8	775	9	784
25-34	289	7	214	2	111	4	118	5	10	2	101	84	15	927	20	947
35-44	71	6	53	2	28	1	49	0	10	0	53	75	6	339	9	348
45-54	21	0	11	0	18	0	28	1	3	0	40	36	6	157	1	158
55-59	8	0	4	0	0	0	8	2	0	0	12	11	0	43	2	45
60 & Over	6	0	1	0	2	0	2	0	0	0	11	9	1	31	0	31
Unknown	34	2	42	1	11	0	14	0	3	0	21	11	1	136	3	139
Total	684	20	536	8	311	8	349	13	48	3	359	312	38	2 599	52	2 651

a – Arrest may relate to crimes not committed in 2020

Source: Jamaica Constabulary Force Statistics and Information Management Unit

male youth (15–24 years) arrested for Category 1 crimes, from 45.8 per cent in 2019 to 35.7 per cent. At the same time, the number of male perpetrators arrested in the 25–34 years and 35–44 years age groups increased by 20.9 per cent and 13.4 per cent, respectively. There was also a reduction in the number of children (0–17 years) arrested for Category 1 crimes, from 308 in 2019 to 202. The number of victims of Category 1 crimes decreased by 5.4 per cent. Males accounted for 70.5 per cent of the 6 738 victims. Some 17.8 per cent of victims were between 15 and 24 years (youth) and 7.1 per cent were between 0 and 17 years (children) {Table 24.6}.

Missing Persons

The number of persons reported missing was 1 615, which was 27.3 per cent less than in 2019. Of those reported

missing, 66.1 per cent was children (3.9 percentage points less than in 2019). Females accounted for 65.7 per cent of missing persons—81.1 per cent of children and 35.6 per cent of adults. By year end, 1 210 had returned (71.7 per cent children), 53 were confirmed dead (11.3 per cent children) and 352 were still missing (55.1 per cent children).

Suicides

There was a 25.9 per cent reduction in the number of reported cases of suicide, from 58 to 43. Males accounted for 86.0 per cent of victims and ‘Hanging’ continued to be the most common method used (72.1 per cent). Five victims were below 18 years (children) and eight over 65 years (elderly). The parish of St Catherine recorded the highest number of cases, with seven, while the parishes of St Andrew, St Elizabeth and Westmoreland recorded six each.

TABLE 24.6
AGE GROUP AND SEX OF VICTIMS OF CATEGORY 1 CRIMES, 2020

AGE GROUP	MURDER		SHOOTING		ROBBERY		BREAK-IN		LARCENY		RAPE	AGGRAVATED ASSAULT		TOTAL BY SEX		GRAND TOTAL
	M	F	M	F	M	F	M	F	M	F		M	F	M	F	
0-9	4	3	7	6	1	0	0	1	0	0	45	1	3	13	58	71
10-14	4	1	13	4	5	7	0	2	0	0	156	2	4	24	174	198
15-17	13	2	33	8	15	8	0	6	2	0	97	17	6	80	127	207
18-24	191	10	257	53	127	119	31	43	5	6	85	50	16	661	332	993
25-34	371	30	420	63	191	161	97	121	10	16	63	64	22	1 153	476	1 629
35-44	226	17	253	40	151	112	127	123	11	10	18	63	15	831	335	1 166
45-54	170	28	164	25	113	66	129	89	8	9	12	57	12	641	241	882
55-59	41	7	50	8	53	31	63	48	5	2	7	10	4	222	107	329
60 & Over	51	10	48	8	89	36	98	64	7	6	7	31	9	324	140	464
Unknown	139	5	579	20	24	17	33	7	4	1	8	20	3	799	61	860
TOTAL	1 210	113	1 824	235	769	557	578	504	52	50	498	315	94	4 748	1 990	6 738

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

TABLE 24.7
NUMBER OF PERSONS DEPORTED TO JAMAICA BY TYPE OF CRIME AND COUNTRY, 2019 AND 2020

OFFENCE	2019					2020				
	USA	CANADA	ENGLAND	OTHER	TOTAL	USA	CANADA	ENGLAND	OTHER	TOTAL
Possession of Drugs	191	12	22	41	266	142	6	12	28	188
Firearm Offences	34	3	2	2	41	22	0	0	3	25
Murder, Manslaughter, Attempted Murder	26	2	6	4	38	29	2	4	0	33
Illegal Entry, Overstay, Illegal Re-entry	158	70	6	201	435	113	12	6	65	196
Larceny Offences	50	3	0	9	62	38	2	5	3	48
Fraud, False Document	35	2	0	6	43	22	2	0	2	26
Wounding, Assault, Battery	52	6	6	8	72	60	3	5	4	72
Sexual Offences	21	6	5	0	32	19	5	5	3	32
Kidnapping	4	0	0	0	4	2	0	0	0	2
Money Laundering	6	0	1	0	7	3	0	0	0	3
Other Offences	38	0	0	13	51	21	1	0	4	26
TOTAL	615	104	48	284	1 051	471	33	37	112	653

Source: Jamaica Constabulary Force, National Intelligence Bureau

Deportation

For the last 13 years, the number of people deported to Jamaica annually has steadily declined. The reduction between 2019 and 2020 was a further 37.9 per cent, the largest year-on-year reduction to date; however, this margin of reduction may be due in part to the COVID-19 pandemic. Of those returned, 72.1 per cent was from the United States of America (USA), 17.2 per cent from 'Other' countries, 5.7 per cent from England, and the remaining 5.0 per cent from Canada (Table 24.7). The largest reduction in persons deported (68.3 per cent) was from Canada and the

lowest (22.9 per cent) was from England. Of those deported, 30.0 per cent was for overstaying/illegal entry/re-entry and 28.8 per cent for possession of drugs. Overstaying/illegal entry/re-entry was the main reason for deportation from 'Other' countries (58.0 per cent). However, for the USA, England and Canada, involvement in criminal activity other than overstaying/illegal entry/re-entry was the main reason, at 76.0 per cent, 83.8 per cent and 63.6 per cent, respectively. This was the continuation of a trend for the USA and England. However, in the case of Canada the number of persons deported for criminal activity was

TABLE 24.8
REPORTED ROAD ACCIDENTS INVOLVING FATALITIES BY PARISH, 2019 AND 2020

PARISH	2019		2020	
	NUMBER OF FATAL COLLISIONS	NUMBER OF PERSONS KILLED	NUMBER OF FATAL COLLISIONS	NUMBER OF PERSONS KILLED
Clarendon	33	35	22	24
Hanover	16	17	23	25
Kingston	23	27	24	28
Manchester	27	31	23	26
Portland	9	9	10	10
St Andrew	51	51	45	47
St Ann	41	49	19	24
St Catherine	62	66	56	63
St Elizabeth	26	29	35	37
St James	33	36	30	35
St Mary	14	17	20	24
St Thomas	3	3	9	10
Trelawny	20	23	13	19
Westmoreland	43	45	58	61
TOTAL	401	438	387	433

Source: Jamaica Constabulary Force, Public Safety and Traffic Enforcement Branch

TABLE 24.9
AGE GROUP AND SEX OF ROAD USERS WHO DIED IN
TRAFFIC ACCIDENTS
2019 AND 2020

Age Group	2019			2020		
	Male	Female	Total	Male	Female	Total
00-04	1	1	2	2	2	4
05-09	0	2	2	1	1	2
10-14	7	1	8	3	2	5
15-19	25	4	29	31	3	34
20-24	54	6	60	63	3	66
25-29	48	10	58	44	1	45
30-34	37	3	40	42	4	46
35-39	33	4	37	23	6	29
40-44	16	2	18	16	4	20
45-49	23	2	25	19	2	21
50-54	17	5	22	27	4	31
55-59	17	5	22	25	1	26
60-64	22	1	23	18	5	23
65-69	13	2	15	10	1	11
70-74	7	1	8	12	1	13
75 & OVER	14	5	19	10	5	15
Unknown	45	7	52	36	6	42
TOTAL	379	61	440	382	51	433

Source: Jamaica Constabulary Force, Public Safety and Traffic Enforcement Branch

usually less than those deported for overstaying/illegal entry/re-entry. Males accounted for 92.0 per cent of those returned. Two persons were extradited from Jamaica to the United States.

Traffic Accidents and Infringements

During the period, there was a reduction in the number of fatal collisions by 3.5 per cent and the number of fatalities by 1.1 per cent. The highest proportion of fatalities was again recorded in the parish of St Catherine (14.5 per cent), followed by Westmoreland (14.1 per cent) and St Andrew (10.9 per cent) {Table 24.8}. These three parishes accounted for almost 40.0 per cent of fatalities. The trend continued with motorcyclists being the main category of road user killed, at 32.3 per cent, followed by pedestrians at 20.3 per cent, private motor car drivers, 15.2 per cent and private motor car passengers, 10.9 per cent. Just over 88.0 per cent of the victims were male. There were 100 victims between 15 and 24 years (youth) and 39 victims over 64 years (elderly) {Table 24.9}. The main causes of accidents were: Excessive Speeding (23.3 per cent); Failure to Keep Nearside¹²/proper traffic lane (19.9

per cent); Pedestrian Error (14.0 per cent); and “Other” factors, which accounted for 21.2 per cent.

A total of 404 239 tickets with fines of approximately \$829.7 million were issued for various traffic offences, 28.5 per cent less than in 2019. The most common offence for which tickets were given was for not wearing a seatbelt (24.5 per cent), followed by excessive speeding (10.0 per cent). At year end, 48.1 per cent of the tickets with fines totalling just under \$391.8 million had been paid at Tax Administration Jamaica, 3.6 per cent valued at \$39.3 million was settled in court, 45.3 per cent valued at \$375.8 million was before the court and the remaining 3.0 per cent valued at \$22.6 million was still outstanding.

Special JCF Divisions/Units

The *Major Organised Crime and Anti-Corruption Task Force* continued to target major organized criminal networks and corruption in the public sector. A total of 14 operations were conducted and this led to the arrest of 15 persons, of which 14 were charged. There was a 68.9 per cent reduction in the number of operations conducted, a 62.5 per cent reduction in the number of arrests and a 64.1 per cent reduction in the number of persons charged compared with 2019. The main offences for which persons were charged included: breaches of the Law Reform (Fraudulent Transactions) (Special Provision) Act, 2013 (7 arrests and 5 charged) and breaches of the Dangerous Drugs Act, 2013 (4 arrests and 4 charged).

During the year, the *Transnational Crimes and Narcotics Division* conducted 1 028 operations, which led to the seizure of 41 224.8 kg of marijuana with a local street value of approximately \$907.0 million and 356.5 kg of cocaine with a street value of \$2.7 billion. The division also seized 24 motor vehicles and 10 boats. Additionally, 30 627.7 kg of cured marijuana and 289.6 hectares of marijuana cultivation were destroyed under the Ganja Eradication Programme. A total of 222 persons (78.8 per cent male) were arrested for drug smuggling. Of those arrested, 22 were foreign nationals and included six Bahamians, four Hondurans and three Canadians.

The *Counter Terrorism and Organized Crime Investigation Branch* (C-TOC) conducted 368 operations/raids, arrested 276 persons and laid charges against 268. The raids and charges included:

- 10 raids carried out by the Intellectual Property Unit, which resulted in the arrest of five persons and the seizure of goods¹³ valued at approximately \$201.8 million.
- Five operations conducted and eight persons charged

12. Nearside refers to the edge of the pavement, roadside or kerb/curb.

13. Counterfeit/contraband – footwear, apparel, accessories and pharmaceutical products.

with various financial crimes by the Constabulary Financial Unit. The unit also provided support to 54 money laundering cases.

- 14 raids and six arrests by the Trafficking in Persons unit. The unit also investigated 45 reports of human trafficking and rescued eight victims (seven females). Two cases have been placed before the courts and a conviction was received in another case. A total of 10 public sensitizations sessions were conducted, with 648 participants.
- 67 operations and 121 raids conducted by the Lottery Scamming Task force. These led to 51 persons charged and 17 convictions.
- Nine gang members convicted and sentenced, based on investigations conducted by the National Strategic Anti-Gang Unit.

The *Community Safety and Security Branch* (CSSB), in keeping with its mandate to foster improved relations between the police and the citizenry continued to work with key community-based groups. The work of the CSSB was greatly affected by the COVID-19 pandemic. During the period, one active Beach Watch Group was sensitized. The suspension of face-to-face classes in schools in March also had an impact on operations under the **Safe School Programme**. There are 221 schools and 203 School Resource Officers (SROs) on the programme. During the period when schools were physically in session, 68 site visits were made, and four security surveys conducted. However, an additional 20 SROs were trained to increase the complement of officers available to support schools when physical attendance resumes.

The *National Police College of Jamaica* facilitated the training of 8 148 members of the JCF in a number of advanced and professional training courses. Training programmes included: firearm requalification; human rights and use of force policy; search procedures; Lock-up Administration and Prison Management; and language training in Chinese mandarin.

Crime Stop Programme

The number of calls made to Crime Stop during the review period declined by 35.3 per cent, from 1 050 in 2019 to 679. An analysis of calls received showed that: 214 were in relation to illegal firearm and ammunition; 138 for gunmen; 63 for wanted persons; 39 drug-related; and 31 for murders. A total of 44 arrests were made from the calls received, which included: 10 for illegal possession of firearm; seven for illegal possession of drugs; and three each for murder, child maintenance, illegal immigrants

and rape. The ratio of success-to-calls investigated was 1:8. The following were seized or recovered: 40 illegal firearms; 472 rounds of ammunition; 1 855.0 kg of cured marijuana; and 2 000 marijuana seedlings. A total of 4.7 hectares of marijuana cultivation was also discovered. The value of narcotics seized or discovered was approximately \$51.2 million and the value of property recovered was approximately \$6.5 million, while \$5.9 million was paid out in rewards.

Since its inception,¹⁴ Crime Stop has received 29 329 calls, of which 23 030 have been investigated. This has led to the arrest of 2 714 persons (353 for murder), the seizure of narcotics valuing just over \$855.9 million and the recovery of property valuing approximately \$260.1 million. Some \$48.4 million has been paid out in rewards, of which \$30.8 million was contributed by the MNS and \$14.5 million from the National Crime Prevention Fund that operates Crime Stop.

JAMAICA DEFENCE FORCE (JDF)

The strength of the Regular Force was 5 306 and the Reserve Force was 449 as at 31 December. The strength of the Regular Force increased by 37.7 per cent while the Reserve Force declined by 42.6 per cent. Both forces continued to operate below establishment size,¹⁵ at 45.6 per cent and 84.3 per cent, respectively. There were 331 officers in the Regular Force and 80 officers in the Reserve Force. A total of 1 136 recruits enlisted, of which 36 were commissioned as officers in the Regular Force and 25 in the Reserve Force. At the same time, 582 persons were discharged from the Force, with “Termination of engagement” (193) and completion of engagement (187) being the main reasons—four soldiers died.

For the period, 226 courses were provided to 4 710 JDF personnel and 71 local partners. The majority was delivered by the Caribbean Military Academy’s (CMA) military schools, brigades and units; specialist courses were also delivered by partner training organizations. A total of 113 JDF personnel (100 males) participated in 45 overseas courses/seminars, while 4 253 personnel (3 696 males) participated in 95 local courses. The JDF acquired the Cornwall Automotive Training Institute and renamed it CMA, Montego Bay Campus. The facility also houses the Caribbean Military Technical Training Institute (CMTTI, Cornwall) and Caribbean Infantry Training Centre (CITC Cornwall).

In the area of policy development, the JDF reviewed, amended and promulgated a number of policies and procedures. These included:

14. September 1989.

15. The new establishment size approved in 2018 is 9 760 for the Regular Force and 2 866 for the Reserve Force.

- Welfare Fund Policy (Amendment)
- Procurement and Expenditure Policy
- Policy on the treatment of service members involved in civil cases
- Enlisted Ranks Promotion Policy (Amendment)
- Compulsory Retirement Age Policy
- Policy on physical fitness and implications for service and advancement
- Policy on the treatment of special cases for enlistment and extension of service.

The JDF continued to provide support to the JCF in a number of **operations**. These operations aimed to reduce the number of major crimes in hotspots and re-establish citizen security. Under Operation “RELENTLESS II”, 12 766 operations were conducted that led to the arrest of 70 persons, the detention of 2 257 and the recovery of 62 assorted weapons, 46 magazines and 1 181 rounds of ammunition. Operation “FRESH START” focused on the four communities designated as Zones of Special Operations (ZOSOs): Mount Salem in St James; and Denham Town, August Town and Greenwich Town in Kingston and St Andrew. Operations across the four communities led to the arrest of 37 persons, the detention of 546 and the recovery of 9 assorted weapons, 10 magazines and 105 rounds of ammunition. Operation “RESTORE PARADISE” targeted areas where States of Emergency (SOE) had been declared. The five SOEs were: the tri-parish SOE (St James, Hanover and Westmoreland); the bi-parish SOE (St Catherine and Clarendon); the Kingston West and Kingston Central SOE; the Andrew South SOE; and the Kingston East SOE. All SOEs expired on August 17. Over the period (January 1 to August 16), a total of 80 assorted weapons, 73 magazines and 2 933 rounds of ammunition were recovered, while 1 641 persons were detained and 38 arrested.

The JDF also undertook counter-illicit trafficking operations. Operation “VIGILANCE” was launched to provide sustained counter-illicit trafficking and general maritime security in Jamaica’s maritime domain and territorial space in order to deter, detect and disrupt/defeat criminal activities and other threats to the state and entities within it. Activities under this operation led to the seizure of illicit drugs, including 12 359.5 kg (27 248 lbs) of marijuana and a number of other items such as 560 rounds of ammunition, three firearms, three vessels, fuel, United States currency and various communication devices. There was also the detention of 58 persons.

For the first time since its establishment, the JDF’s Disaster Assistance and Relief Team was deployed locally—in the communities of Bull Bay, Nine Miles, Irish Town and

Harbour View in St Andrew—after rains associated with Tropical Storms Eta and Zeta led to extensive flooding (see chapter on Sustainable Development). As at December 15, a total of 213 truckloads of silt were removed from Bull Bay.

The JDF also assisted in the management of the COVID-19 pandemic. This included providing support to ensure the curtailing of movement in the quarantined communities of Bull Bay, St Andrew; Corn Piece and Sandy Bay in Clarendon; and Bamboo River, Church Corner and Lower Summit in St Thomas. Personnel were also assigned to the ports of entry to facilitate the return of Jamaican nationals under the controlled re-entry programme and with the reopening of Jamaica’s borders. They helped to process persons arriving at the island’s international airports, in accordance with the government’s COVID-19 protocols. The JDF also assisted with the delivery of over 70 000 food packages to persons in need in the parishes of St James, Kingston and St Andrew, Clarendon, St Catherine, Westmoreland and St Mary. The Engineer Regiment also provided support to facilitate the establishment of isolation facilities and field hospitals.

The JDF Coast Guard (JDF CG) conducted patrols to protect the Exclusive Economic Zone against illegal fishing and narcotics smuggling, which resulted in the seizure of, among other things, 5 927.4 kg (13 067.8 lbs) of marijuana, and the detention of 79 persons in relation to narcotics seizures. The JDF Air Wing (JDF AW) conducted 15 casualty evacuations and two search and rescue operations, while the JDF CG conducted 23 search and rescue operations and saved 92 lives.

Department of Correctional Services (DCS)

Personnel

The DCS continued to operate at 10.6 per cent below establishment size¹⁶ with 2 159 Correctional Officers (one more than in 2019). The agency also operated at 12.1 per cent below establishment size¹⁷ with 160 Probation Aftercare Officers (nine fewer than in 2019). During the period, 111 Correctional Officers were recruited, while 67 Correctional Officers (25 resigned, 22 were dismissed, 12 retired and 8 died) and 18 Probation Aftercare Officers (9 retired, 6 died and 3 resigned) left the service. There was no recruitment of new Probation Aftercare Officers.

Custodial and Non-custodial Clients

The total adult custodial population under the care of the DCS on December 31st was 3 524 and included 590

16. Establishment size for Correctional Officers is 2 415.

17. Establishment size for Probation Aftercare Officers is 182.

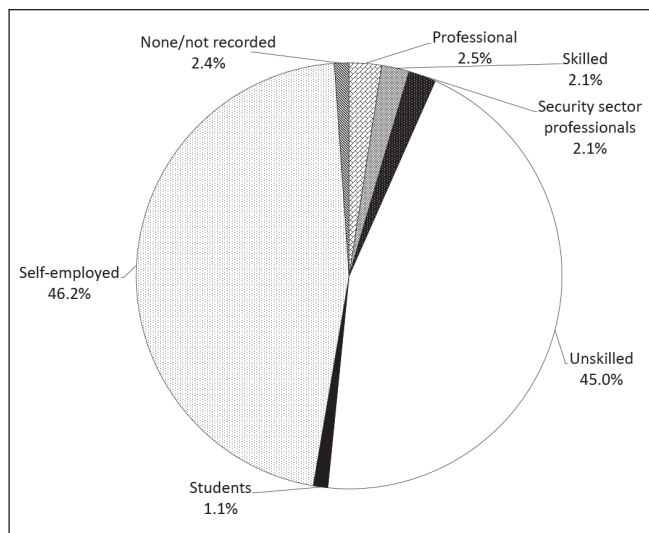


FIGURE 24C: OCCUPATIONAL STATUS OF NEW ADMISSIONS TO CORRECTIONAL CENTRES, 2020

males held on remand at the Horizon Adult Remand Centre and 14 females held on remand at the South Camp Adult Correctional Centre. This was a 6.3 per cent reduction compared with 2019. The Tower Street and St Catherine Adult Correctional Centres (TSACC and STCACC) operated at 98.5 per cent and 4.5 per cent above capacity,

respectively.¹⁸ Males accounted for 97.0 per cent of the total adult custodial population. The number of persons admitted into correctional facilities during the year declined by 25.6 per cent from 1 094 to 814. The top five reasons for admission continued to be: Illegal possession of firearm/ammunition (23.1 per cent); murder/manslaughter/attempted murder (11.1 per cent); larceny/break in larceny/larceny of motor vehicle (10.5 per cent); sexual offences (10.2 per cent); and unlawful wounding/wounding with intent (6.6 per cent) {Table 24.10}. The number of foreign nationals admitted declined by 46.2 per cent from 26 in 2019 to 14, of which 12 were male. Some 46.2 per cent of all persons admitted were self-employed, while 45.0 per cent was unskilled. There were also 17 members of the security services admitted—police officers, soldiers and security guards (Figure 24C).

Of the total admissions, 59.0 per cent was new, 26.9 per cent readmissions and 14.1 per cent previously convicted but were not given custodial sentences (Table 24.11). Males accounted for 94.6 per cent of new admissions, 98.6 per cent of readmittants and 98.3 per cent of the previously convicted. An analysis of the readmissions data showed that 50.2 per cent of readmittants were first-time reoffenders, 17.8 per cent reoffended twice, 11.9 per cent reoffended three times, 16.0 per cent reoffended at least four times and 4.1 per cent was

**TABLE 24.10
TOTAL ADMISSIONS TO ADULT CORRECTIONAL INSTITUTIONS BY OFFENCE, AGE AND SEX, 2020**

OFFENCE	17-20	21-25	26-30	31-35	36-40	41-45	Over 46	Total Male	Total Female	Total
Murder/Manslaughter/Attempted murder	6	7	24	12	18	8	15	84	6	90
Aiding & Abetting/Accessory before the fact (murder)	0	1	0	0	1	0	0	2	0	2
Unlawful wounding/wounding with intent	2	13	11	11	8	4	5	52	2	54
Sexual Offences	5	2	9	11	8	15	33	83	0	83
Assault/Assault occasioning bodily harm	2	5	7	2	2	0	2	16	4	20
Burglary/Break-in Larceny	9	6	10	4	3	5	3	40	0	40
Robbery/Robbery with aggravation	10	13	9	7	8	0	1	46	2	48
Illegal possession of firearm/ammunition	18	57	50	26	21	6	10	188	0	188
Shooting with Intent	1	7	6	4	1	3	3	25	0	25
Larceny/Larceny of Motor Vehicle	5	12	19	9	12	14	14	84	1	85
Forgery, Fraud, Embezzlement	0	5	6	5	4	5	9	29	5	34
Unlawful Possession of/receiving stolen property	4	5	5	5	2	5	2	27	1	28
Malicious Destruction of Property	0	0	4	5	3	0	1	12	1	13
Breaches of the Dangerous Drug Act	0	4	5	2	5	9	12	32	5	37
Debtor/Breach of Debtor Act	0	0	0	0	1	1	4	5	1	6
Traffic Offences	0	0	0	1	6	2	2	11	0	11
Escaping Custody	0	2	0	0	0	0	0	2	0	2
Other Offences	1	5	9	13	7	5	8	45	3	48
Total	63	144	174	117	110	82	124	783	31	814

Source: Department of Correctional Services

18. Maximum capacity of each correctional centre is 850.

TABLE 24. 11
TOTAL ADMISSIONS TO ADULT CORRECTIONAL CENTRES BY AGE, 2020

New				
AGE	Tower Street ACC	St Catherine ACC	South Camp ACC	Total
18-20	28	30	1	59
21-25	66	46	1	113
26-30	50	42	6	98
31-35	28	29	8	65
36-40	32	25	3	60
41-45	15	23	3	41
46 & over	17	23	4	44
Sub-Total	236	218	26	480
Previously Convicted (Non-custodial)				
AGE	Tower Street ACC	St Catherine ACC	South Camp ACC	Total
18-20	1	2	0	3
21-25	3	9	0	12
26-30	13	17	0	30
31-35	10	12	0	22
36-40	7	7	1	15
41-45	5	4	1	10
46 & over	14	9	0	23
Sub-Total	53	60	2	115
Readmission				
AGE	Tower Street ACC	St Catherine ACC	South Camp ACC	Total
18-20	0	1	0	1
21-25	9	10	0	19
26-30	16	30	0	46
31-35	14	16	0	30
36-40	14	20	1	35
41-45	12	18	1	31
46 & over	14	42	1	57
Sub-Total	79	137	3	219
Grand Total	368	415	31	814

Source: Department of Correctional Services

unknown. The recidivism rate remained at 41.0 per cent while the readmission rate went down one percentage point to 27.0 per cent. Approximately 40.2 per cent of those admitted were serving sentences of up to 12 months (Figure 24D). At year end, there were 858 adults awaiting sentencing, 13.0 per cent less than in 2019.

The **juvenile** custodial population was reduced by 6.8 per cent to 191, of which 69.6 per cent was male. A total of 90 wards were on correctional orders (sentenced) and the remaining 101 were on remand (Table 24.12). Total admission in juvenile facilities was 54, which was 31.7 per cent less than in the previous year; 79.6 per cent of those admitted were male. These 54 children were on Correctional Orders. The main reasons for admission were as in 2019: larceny/shop/house breaking (24.1 per cent); uncontrollable behaviour/disorderly conduct (22.2 per cent); possession of offensive weapon/illegal possession of firearm/ammunition (9.3 per cent); and assault/assault occasioning bodily harm (7.4 per cent) {Table 24.13}. At the end of the year, the wards on remand

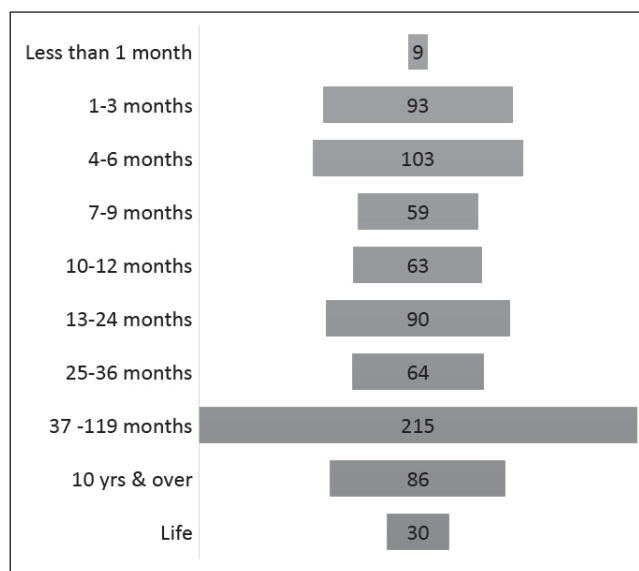


FIGURE 24D: LENGTH OF SENTENCE, 2020

TABLE 24.12
POPULATION FIGURES OF JUVENILE INSTITUTIONS AS AT DECEMBER 31, 2020

INSTITUTION	CLASSIFICATION	REMAND	CORRECTIONAL ORDER
Hill Top Juvenile Correctional Centre	Maximum (male)	0	18
Rio Cobre Juvenile Correctional Centre	Medium (male)	0	40
Metcalfe Street Secure Juvenile Centre	Maximum (male)	70	5
South Camp Juvenile Correctional Centre	Maximum (female)	31	27
TOTAL		101	90

Source: Department of Correctional Services

TABLE 24.13
ADMISSION TO JUVENILE INSTITUTIONS BY AGE, SEX AND OFFENCE, 2020

MAIN CATEGORIES

OFFENCE	Under 13 years	13 years	14 years	15 years	16 years	17 years	Total Male	Total Female	Grand Total
Murder/Manslaughter	0	0	0	0	1	2	3	0	3
Shooting with Intent	0	0	0	0	0	1	1	0	1
Unlawful Wounding	0	0	0	1	2	0	0	3	3
Possession of Offensive Weapon/Illegal Possession of Firearm/Ammunition	0	0	0	0	1	4	5	0	5
Break-in Larceny/Break-in Entering/Attempted larceny/Larceny/Shop break-in	0	0	2	2	6	3	12	1	13
Dangerous Drug	0	0	0	0	0	0	0	0	0
Assault/Assault occasioning bodily harm	0	0	1	0	1	2	4	0	4
Sexual Offences (includes rape)	0	0	0	0	0	0	0	0	0
Malicious Destruction of Property	0	0	1	0	1	1	3	0	3
Robbery/Robbery with aggravation	0	0	0	0	0	0	0	0	0
Escaping Custody	0	0	1	0	0	1	2	0	2
Unlawful Possession/Receiving Stolen Property	0	0	0	0	1	1	2	0	2
Burglary	0	0	0	0	0	1	1	0	1
Buggery	0	0	0	0	2	1	2	1	3
Sacrilege	0	0	1	0	0	0	1	0	1
Threat	0	0	0	0	0	1	1	0	1
ORDER									
Breach of Supervision Order	0	0	0	0	0	0	0	0	0
Breach of Probation Order	0	0	0	0	0	0	0	0	0
Breach of Fit Person Order	0	0	0	0	0	0	0	0	0
OTHER									
Uncontrollable Behaviour/Disorderly Conduct	0	2	2	0	3	5	6	6	12
Care and Protection	0	0	0	0	0	0	0	0	0
GRAND TOTAL	0	2	8	4	16	24	43	11	54

Source: Department of Correctional Services

were still awaiting sentencing. The number of juveniles who appeared before the courts declined by 52.4 per cent (Table 24.14). Males accounted for 59.6 per cent of the 1 182 juveniles who appeared before the courts. The main reasons of which juveniles appeared before the courts were: care and protection/child abandonment/child abuse (43.7 per cent); uncontrollable

behaviour/disorderly conduct (17.7 per cent); and wounding/assault/assault occasioning bodily harm (13.5 per cent).

Community Services

The Probation After-care Officers in the Community Services Arm of the DCS provided support to persons

TABLE 24.14
REASONS JUVENILES APPEARED BEFORE THE COURT, 2018–2020

MAIN CATEGORIES	2018		2019		2020	
	M	F	M	F	M	F
OFFENCE						
Murder/Manslaughter	9	1	7	0	0	0
Conspiracy to attempt murder/Accessory to murder	0	0	1	0	1	0
Sexual Offences ^a	177	10	205	4	59	3
Abduction	1	0	0	0	0	0
Robbery/Robbery with Aggravation/Burglary/Larceny/Predial Larceny/Break-in	130	19	156	15	69	11
False Pretences/Fraudulent conversion/Forgery	10	1	7	0	5	0
Unlawful Possession/Receiving stolen property	15	1	10	3	5	0
Wounding/Assault/Assault occasioning bodily harm	384	122	359	96	129	31
Dangerous Drugs	12	2	11	2	4	0
Breaching Firearm Law/Armed with offensive weapon/Shooting with intent	127	20	133	15	42	3
Arson/Malicious destruction	71	16	44	16	14	5
Breaking Road Traffic Law	61	3	51	3	25	3
Minor and other offences ^b	76	14	57	24	25	10
ORDER						
Breach of Probation Order/Variation Order/Supervision Order/Protection Order	17	9	11	10	8	5
OTHER						
Care and Protection/Child Abandonment/Child Abuse	344	445	314	490	213	303
Uncontrollable Behaviour/Disorderly conduct	211	203	217	224	106	103
GRAND TOTAL	1 645	866	1 583	902	705	477

a – includes rape, assault with intent to rape, sex with a person under 16 yrs, carnal abuse, incest, indecent assault, grievous sexual assault, buggery, gross indecency

b – includes suspected persons, resisting arrest, bestiality and gambling

Source: Department of Correctional Services

sentenced by the courts and voluntary/walk-in clients. Support included supervision of persons on court-issued orders, such as the: Probation Order; Supervision Order; Community Service Order; and Correctional Order. During the period, After-care Officers monitored 1 421 new non-custodial cases, 37.7 per cent less than in the previous year. Juveniles accounted for 27.9 per cent of the cases. Cases monitored included: 846 probation orders (251 children); 253 suspended sentence supervision orders (8 children); and 135 community service orders (10 children). Some 2 126 non-custodial cases were closed (15 more than in 2019), of which 69.1 per cent was satisfactorily completed. The decline in the number of people voluntarily seeking assistance showed a further decline, going down by 39.2 per cent during the reporting period (Table 24.15). As in previous years, with the exception of “other” (40.2 per cent), the main reasons for utilizing the service were Unsatisfactory Behaviour of Parent/Guardian (27.6 per cent); Uncontrollable Child (12.1 per cent); and Malfunctioning Families (9.4 per cent). The number of cases investigated by Probation Officers went down by 35.9 per cent to 8 091.

TABLE 24.15
PERSONS SEEKING ASSISTANCE, 2016–2020

Nature of Case	2016	2017	2018	2019	2020
Uncontrollable Child	294	248	232	274	102
Absent Parent/Guardian	46	14	14	23	16
Parent/Guardian's Incapacitation	22	11	6	7	5
Unsatisfactory Behaviour of Parent/Guardian	318	318	284	278	233
Malfunctioning Family	287	151	125	155	79
Legal Assistance	43	65	55	60	35
Multiple	49	70	61	58	35
Other	660	693	717	533	339
Grand Total	1 719	1 570	1 494	1 388	844

Source: Department of Correctional Services

Initiatives in Correctional Services

Phase 3 of the Jamaica Strategic Corrections Partnership Project was completed in September. The project aimed to strengthen the capacity of the DCS to effectively work with the vulnerable clients by improving risk assessment

completion rates; commencing implementation of a case management system in adult correctional facilities; implementing an Inmate Care Coordinator Scheme; and developing training curricula for staff working with sex offenders and persons with mental health issues. Under the project, eight case managers were engaged from October 2019 to June 2020 to: administer risk and needs assessment; develop, action and monitor sentence plans; provide counselling; and develop rehabilitation programmes. They worked in the St Catherine, Tower Street and Tamarind Farm Adult Correctional Centres (STCACC, TSACC and TFACC). Inmates were also engaged in group therapy sessions that covered topics such as: prison and stress; grieving; anger management; coping mechanisms; resilience; optimism; Purpose by Design; and How Power Changes Behaviour. A curriculum and training manual was developed for the Carl Rattray Staff College and a three-day training workshop held for Correctional Officers and Probation Officers. Ten trainers from the college also participated in the training. The pilot Inmate Care Coordinator (ICC) Programme commenced implementation at the three adult correctional centres. Assistant Superintendents, Overseers, Staff Officers and other staff participated in a sensitization session prior to the launching of the programme in the three targeted adult institutions. However, due to severe staff shortage in the institutions, staff were often reassigned to other duties, which led to the programmes not being fully implemented.

The National Restorative Justice Policy 2012 outlined provisions for DCS to make referrals to the programme post sentencing for minor and major offences. During the year, nine referrals were made, subsequent to which, sessions were held with the victims and offenders from STCACC, TSACC and TFACC.

In responding to the demand for masks in the midst of the COVID-19 pandemic, inmates were engaged in a mask-making project where they were trained to make masks for distribution to staff and other inmates. The project is expected to be expanded across five adult institutions in March 2021.

The Technological Resources for Family and Academic Support Programme commenced in the latter part of the year. The initiative seeks to ensure meaningful contact with family and better access to social and academic services for juveniles, during and after COVID-19, that will aid in the rehabilitation process and provide adequate educational support. This included the expansion of technology platforms within the institutions to enable the following activities virtually: family sessions, educational and life/employability skills classes, expansion/continuation of mentorship programme, psychological and psychiatric interventions, and court sessions. Technological resources such as laptops, modems and tablets were given to the

juvenile institutions.

In the area of rehabilitation, all 191 juveniles were involved in the educational programme and 23 sat the 2020 CSEC examinations. The subjects sat were: English Language, Mathematics, Human and Social Biology, Principles of Accounts, Social Studies, Family Life Resource, Electronic Document Preparation and Management, and Principles of Business. Of the 23 children sitting the CSEC exams, 12 children (52.2 per cent) passed one or more subjects. As it relates to rehabilitation of the adult population, of the 2 880 persons available to participate in the various programmes, 255 (221 males) were involved in the educational programme; 130 as orderlies; 115 in the sanitation and domestic/sewage plant programme; 94 in cooking and baking; and 72 in tailoring; while 607 persons were performing miscellaneous activities. However, there were 1 345 persons (46.7 per cent) who were not involved in any work/training programme.

JUSTICE

The reform of Jamaica's Justice system remained a priority for the GOJ as guided by Goal 2 of Vision 2030 Jamaica – National Development Plan — “The Jamaican Society is secure, cohesive and just”; the Medium-Term Socio-Economic Policy Framework 2018–21; and the government's strategic priorities, relating to the Rule of Law and Timely Justice Outcomes. Work was undertaken to streamline legislative and operational reform; improve service delivery areas; strengthen access to both formal and alternate justice services, with specific focus on promoting greater application of alternative dispute resolution mechanisms (ADRs) to reduce court case backlog and assist in settling disputes at the community level; and build a stronger institutional framework that is more responsive and accountable. There was also a focus on physical infrastructure development for the courts and the creation of ICT solutions geared towards improving sector efficiency.

Physical Infrastructure

Approximately \$700.0 million was spent to support the construction, rehabilitation and repair of justice facilities across the island. This included the renovation of Public Building West at the Supreme Court, to facilitate the expansion of the Offices of the Director of Public Prosecutions (DPP) and the commencement of construction of the Manchester Family Court. Other projects included the establishment of child diversion offices in St Catherine, Clarendon, Hanover and St James, bringing to 13 the number of child diversion offices in operation. Additionally, an interim justice centre was established in St Thomas. Renovation and upgrading

works were also carried out at several courts islandwide, including the Hanover Parish Court (Lucea); the Supreme Court; St James Parish Court; the Trelawny Family Court; and the Kingston and St Andrew Parish Court – Criminal Division. There was also the retrofitting and renovation of space to facilitate the temporary relocation of the Manchester Parish Court.

Management Information System (MIS)

The onset of the COVID-19 pandemic resulted in the need to establish virtual solutions to complement face-to-face service delivery models. This included the retrofitting of child diversion office spaces with computer-related equipment and a shift to the use of database management software to collate and centralize data to improve efficiency. Additionally, an online training platform was developed for use by internal and external stakeholders to facilitate self-paced training courses, sensitization, awareness and orientation sessions. Equipment to support online delivery of conferences, training, sensitization sessions, and meetings was also procured to militate against disruption in the delivery of justice services. A mobile bus was equipped with audio-visual technology and 78 courtrooms outfitted with audio and video link technology, to enable remote testimonies and facilitate remote court proceedings. Additionally, piloting of the Judicial Case Management System (JCMS)¹⁹ began.

Social Justice Services

The delivery of social justice services, which includes restorative justice, victim services and the child diversion programme, is an important feature of Jamaica's modern justice system. During the report period, 2 039 cases were referred to the *Restorative Justice (RJ) Programme* and 1 657 RJ conferences conducted, with a resolution rate of 97.4 per cent. In addition, 718 sensitization sessions (virtual and face-to-face) were conducted with 10 764 participants. A total of 234 children from across the island were referred to the *national child diversion programme*, which aims to redirect child offenders from the penal system and to rehabilitate, resocialize and reintegrate them into society.

The *Victim Services Division (VSD)* served 6 144 victims, a 19.9 per cent increase compared with 2019. Victims were provided with face-to-face and e-counselling sessions, as well as other services designed to help them cope and eventually heal from the emotional trauma of crime and violence. Of the new clients, 76.8 per cent was female. Among the new female clients who sought the assistance of the VSD, 37.1 per cent was in the 12–18 age group, followed

by 24.1 per cent in the 30–44 age group. The main categories of offence for which clients sought the services of the VSD were: sex-related offences (24.8 per cent); murder (13.4 per cent); domestic violence (9.3 per cent); assault (5.9 per cent); behavioural problems (3.4 per cent); wounding (2.9 per cent); and 'other' with 33.8 per cent. There were eight clients who received services in relation to human trafficking. Additionally, 681 children (603 females) benefited from the VSD's Children in Court programme which aims to reduce the level of trauma experienced by children who interface with the justice system. Additionally, with support through the Citizen Security and Justice Programme (CSJPIII), the VSD disbursed 62 funeral grants to low/no-income families of murdered victims, valuing approximately \$6.1 million.

The *Legal Aid Council* aims to improve access to justice for the most vulnerable and over the year, 50 attorneys were empanelled to provide legal representation under the Legal Aid Programme. The Mobile Justice Service Unit provided legal services to 1 672 beneficiaries across 118 communities. The Council assisted 2 746 clients via duty counsel assignments and representation through 2 601 court cases. Additionally, representation was provided for 57 persons with mental illness held on remand and deemed unfit to plead or held at the Governor General's or the Court's pleasure within the Adult Correctional Facilities.

The *Criminal, Civil and Family Law Unit* processed 573 expungement applications (436 males), of which 393 (110 females) were approved by the Criminal Records (Rehabilitation of Offenders) Board. This represents a 62.4 per cent decrease in approvals compared with 2019. The unit also processed 6 562 Minister's Marriage Licences, of which 4 889 applications were from walk-in clients and 1 673 were submitted from hotels. There was a 3.3 per cent increase in the number of walk-in applications, however, the total number of licences processed declined by 24.3 per cent as hotel application decreased by 58.3 per cent. The reduction in applications from hotels was due to the impact of COVID-19 on international travel.

The *Legal Services Unit* aims to ensure that the ministry's legislative programme is achieved by researching, guiding and advising on policies that inform the development of the law. Areas of focus during the period included:

- the passage of the Authentication (Foreign Public Documents) Act, 2020 and the Dogs (Liability for Attacks) Act, 202.
- Amendments to a number of Acts including; The Dangerous Drugs Act, The Evidence Act, the Extradition Act, the Justices of the Peace Act, the

19. The JCMS enables real time access to files through scanning and uploading of supporting documentation and strengthened case scheduling. The system will facilitate an improvement in the case disposal rate and also strengthen court utilization.

Criminal Justice (Administration) Act, the Legal Aid Act, the Criminal Records (Rehabilitation of Offenders) Act, the Bail Act and the Mediation Act

- Amendment²⁰ to the Constitution of Jamaica to provide for the tenure of Judges of the Parish Court, Judges of the Traffic Court, Judges of the Family Court, Masters of the Supreme Court, and Registrars of the Court of Appeal and the Supreme Court.

There was increased use of technology to facilitate the continued delivery of training, remotely, by the *Justice Training Institute*. Training programmes conducted included the qualifying training for Justices of the Peace (JPs) and specialized training for JPs in several areas such as, the Lay Magistrates' Court Mediation; Fraudulent Documents: Deterrence, Detection and Investigation; and Increasing Access to Justice. A total of 958 JPs (525 females) participated in various training sessions, with 378 of that number (294 females) completing the qualifying training for JPs and the remaining 486 (231 females), the JP specialized training sessions.

Training sessions were also conducted for justice sector workers, which included the Paralegal Studies Diploma Programme and Fraudulent Document Detection Course. A total of 52 persons completed the Rules of Lay Magistrates' Court session (40 females); 24 persons (21 females) completed the customized training in Paralegal Studies for the Attorney General's Chambers; 15 persons (12 females) pursued the Diploma in Paralegal Studies programme; while 22 persons (20 females) are completing the Deputy Clerks of Court Qualifying Course.

The Courts

Despite the onset of the COVID-19 pandemic, the courts continued to meet the judicial needs of members of the public and help to maintain law and order. During the pandemic, the courts began hearing matters electronically. The installation of audio-visual equipment in 78 courtrooms across 19 courts under the Justice Security, Transparency and Accountability project enabled bail hearings and mention matters to be held virtually.

The courts also implemented operational changes, which have resulted in an increase in the number of judgements delivered at the Supreme Court. For every 100 judgements that were reserved, 318 judgements were delivered. This means that by the end of 2021, there should

be no judgement that is outstanding for more than three to six months at the Supreme Court. The operational changes also led to a further reduction in the overall net criminal case backlog (active cases in backlog) in the Parish Courts, from 32.0 per cent at the end of 2016 to 8.9 per cent at the end of 2020.

Parish Court – Criminal matters

In the Parish Courts, 21 166 new criminal cases were filed, 20.9 per cent less than in the previous year (Table 24.16). The Corporate Area Parish Court - Criminal Division with 22.7 per cent, followed by the St Catherine and St Ann Parish Courts, with 13.0 per cent and 7.9 per cent, respectively, accounted for the three largest proportions of new criminal cases filed.

The overall average disposal rate for cases decreased by 9.2 percentage points to 64.6 per cent. The Hanover Parish Court had the highest disposal rate of 76.4 per cent, while the St Ann Parish Court had the lowest with 51.8 per cent. The overall fall in the case disposal rate in the criminal division of the parish courts had a negative impact on the overall case clearance and case congestion rates. The overall case clearance rate²¹ was 96.1 per cent, 5.5 percentage points less than in 2019. The Manchester Parish Court had the highest case clearance rate of 117.7 per cent, while the Corporate Area – Criminal Court had the lowest at 83.1 per cent. The overall case congestion rate²² recorded for the criminal division of the parish courts was 156.9 per cent, an increase of 10.7 percentage points compared with 2019. The Clarendon Parish Court had the highest congestion rate, 259.1 per cent, and the St Ann Parish Court had the lowest, 119.6 per cent.

The largest proportion of cases disposed was by way of guilty pleas (34.2 per cent), followed by cases dismissed (22.7 per cent). Guilty verdicts accounted for 3.5 per cent and not guilty verdicts, 13.5 per cent. Mediated settlements (of various forms) accounted for 12.0 per cent of the cases disposed. The conviction rate was 37.7 per cent (sum of guilty pleas and guilty verdicts). The three most frequent criminal charges filed in the parish courts were assault occasioning bodily harm with 12.1 per cent; unlawful wounding with 9.3 per cent; and threats with 6.7 per cent. Males accounted for 81.4 per cent of those charged.

On average, the criminal division of the parish courts took seven months to dispose of cases. The Westmoreland Parish Court had the shortest average disposition time of 4.5

20. The Amendment refers to the definition of "Judge" pursuant to Section 3 of the Judiciary Act to facilitate the application of the term judge so that same applies to the lower judiciary, that is, Judge of the Parish Court, Traffic Court etc as these were previously classified as civil servants.

21. The case clearance rate, which is closely related to the case disposal rate, provides a measure of the number of cases disposed (regardless of date/year of initiation) for every new case filed in a particular period.

22. The higher the case congestion rate of a court, the more burdensome the caseload and the longer it will take to dispose of cases.

TABLE 24.16
PARISH COURT CASE STATISTICS, 2020

Parish Court	Number of new cases filed	Active pending case load b/f Jan. 1, 2020	Number of new inactive cases	Total number of inactive cases	Number of new disposed cases	Total number of disposed cases	Active pending new case load	Case disposal Rate (%)	Case Clearance Rate (%)	Case Congestion Rate (%)
Hanover	998	252	88	122	674	827	236	76.4	95.1	131.7
St Catherine	2 747	825	450	592	1 488	2 093	809	70.6	97.7	133.0
Westmoreland	1 603	559	106	169	1 072	1 377	425	73.5	96.4	139.8
St Mary	881	330	92	118	556	893	233	73.6	114.8	120.0
Clarendon	1 436	2 096	203	281	800	1 082	433	69.9	94.9	259.1
Portland	1 221	463	98	139	735	1 081	388	68.2	99.9	138.0
St Elizabeth	1 348	484	115	171	768	1 061	465	65.5	91.4	148.7
Corporate Area										
Criminal	4 800	1 736	1 024	1 274	1 876	2 716	1 900	60.4	83.1	163.8
St Thomas	851	540	70	111	428	677	353	58.5	92.6	176.5
St James	1 517	1 023	208	232	787	1 276	522	65.6	99.4	168.4
St Ann	1 667	436	378	505	485	1 253	804	51.8	105.5	119.6
Trelawny	808	799	62	118	415	653	331	59.0	94.4	208.4
Manchester	1 289	1 962	97	262	591	1 253	601	53.4	117.7	163.8
Total	21 166	10 739	2 991	4 094	10 675	16 244	7 500	-	-	-
Average/Weighted Average	1 628.2	826.1	230.1	314.9	821.2	1 249.5	576.9	64.6	96.1	156.9

Source: The Court Statistical Unit

months, while the Manchester Parish Court had the longest, 9.9 months. Over the last four years, 40.0 per cent of cases filed had been resolved within 90 days; 61.7 per cent within six months and 82.6 per cent within a year.

The trial date certainty rate measures the likelihood that dates set for trial will proceed as scheduled (without adjournment for future dates). The overall average trial date certainty rate for criminal matters across the parish courts was 74.0 per cent,²³ 4.0 percentage points more than in 2019. The parish court of Portland had the highest trial date certainty rate, at 88.0 per cent. The courtroom utilization rate provides a solid measurement of the proportion of time allocated for court hearings, which are utilized throughout the year in each court. The overall courtroom utilization rate across the parish courts was 54.7 per cent, 5.2 percentage points less than in the previous year, while the corresponding rate for night courts was 44.2 per cent, down 10.5 percentage points. Night court activity across the courts was substantially lower than normal, due to the effects of the COVID-19 pandemic on normal court operations.

Supreme Court

The suspension of court activity due to COVID-19 resulted in fewer days available for court sittings and a 16.0 per cent decline in overall case activity in the Supreme Court. A total of 12 757 new cases entered the Supreme

Court, while 8 406 cases were disposed. The number of new cases filed decreased by 2.7 per cent, however, the number of cases disposed increased by 8.1 per cent. The High Court Civil (HCV) and Matrimonial Divisions, with 5 162 and 3 689, respectively, of the total number of new cases filed, accounted for the largest share, while the Revenue Court, Insolvency and Admiralty Divisions each with under 10 new cases filed accounted for the lowest shares. The Matrimonial Division accounted for the largest share of case disposals (35.5 per cent), followed by the Probate Division (26.5 per cent).

The average case clearance rate across the four divisions was approximately 65.9 per cent, an increase of 7.0 percentage points compared with 2019. The case clearance rates ranged from a low of 39.2 per cent in the Commercial Division to a high of 300.0 per cent in the Insolvency Division. The estimated average time taken for cases to be disposed, range from a low of approximately 17 months in the Probate Division to a high of 44 months in the High Court Civil Division. The overall average time to disposition for the divisions of the Supreme Court was 25 months, a month and a half lower than in 2019. The oldest matter disposed in the Supreme Court occurred in the Probate Division, spanning 27.6 years at the time of closure.

Some 60.6 per cent of cases in the Supreme Court were disposed within two years which implies that roughly

23. Does not include the period of court suspension due to restrictions based on the COVID-19 pandemic.

39.4 per cent of the cases were in a state of backlog. The Commercial Division had the highest on-time case processing rate of 86.5 per cent, while the High Court Civil Division recorded the lowest with 39.0 per cent. The hearing/trial date certainty rate ranged from an approximate low of 60.0 per cent in the Home Circuit Court to a high of 80.0 per cent in the Revenue Court. Additionally, the rate for clearance of outstanding judgements was 234.0 per cent, an improvement of 45.0 percentage points compared with 2019.

LEGISLATIVE PROGRAMME

Despite disruptions due to the COVID-19 pandemic, a number of new legislations were passed and existing ones amended. These included the following:

- The Appropriation Act, 2020
- The Registration of Titles (Amendment) Act
- The Data Protection Act, 2020
- An Act to Amend the General Consumption Tax Act
- An Act to Amend the Special Economic Zones Act
- An Act to Repeal the Dogs (Liability for Injuries by) Act, and to provide for liability for attacks by dogs and for connected matters
- An Act to Amend the Income Tax Act.

Bills introduced included: the Representation of the People (Amendment) Act, 2020; the Sexual Harassment Act, 2020; the Independent Fiscal Commission Act, 2020; and the National Identification and Registration Act, 2020

INPUT FROM OTHER SELECTED ORGANIZATIONS

There was a 51.2 per cent increase in the number of complaints received by the **Independent Commission of Investigations (INDECOM)**. Of the 1 098 complaints received, 84.5 per cent were against the JCF, 8.2 per cent against the DCS, 4.2 per cent against the JDF, and 3.1 per cent against the JCF and JDF combined. The major categories of complaints were: assault (31.0 per cent), discharge of firearm (22.0 per cent), fatal shooting (7.5 per cent), unprofessional conduct (6.7 per cent) and shooting injury (6.5 per cent). The majority (80.4 per cent) of the 950 victims were male. Of total complainants, 34.1 per cent was from Kingston and St Andrew, and 17.1 per cent from St Catherine. A total of 662 complaints had been investigated and disposed, 7.8 per cent more than in 2019.

Complaints received and investigated by the **Office of the Public Defender (OPD)** increased by 4.6 per cent to 298

from 285 in 2019. Some 32.9 per cent was against the MNS/DCS/JCF; 6.7 per cent each against the Ministry of Labour and Social Security, and the Ministry of Education, Youth and Information; 6.0 per cent against a non-authority; and 5.7 per cent against the Ministry of Health and Wellness. Males accounted for 59.7 per cent of complainants. A total of 77 cases were closed during the period.

OUTLOOK

As the new Medium-Term Socio-Economic Policy Framework is developed for 2021 onwards, it is anticipated that there will be an expanded focus on security and justice, as the government seeks to further increase the levels of safety and security in the country, and achieve the targets set under Vision 2030. The implementation of the Citizens Security Plan will commence. The MNS will continue to implement initiatives to promote safety and security, and reform and modernize the law enforcement system, which include:

- finalization of the draft Jamaica Visa Policy, Plan of Action and Monitoring and Evaluation Framework
- finalization of the national action plan to facilitate implementation of the Caribbean Firearms Roadmap
- construction of a new police divisional headquarters in Westmoreland and the government-owned autopsy suite
- finalization of the Trafficking in Person policy
- full implementation of the handheld traffic ticketing solution.

In the area of justice, the MOJ will continue to rehabilitate and make new investments in physical infrastructure to accelerate the reform process of enhancing the public's access to justice services and increase efficiency across the sector. This will include, inter alia:

- construction and operationalization of the Manchester and St Ann Family Courts
- renovation of the Clarendon Parish Court
- construction of a new building for at least one justice centre
- integration of the Traffic Ticket Management System and Judicial Case Management System to further streamline and improve the management of traffic tickets throughout the various stages.

Work will also be done on several pieces of legislation, including amending Acts related to extradition, bail, mediation, legal aid, Justices of the Peace and indemnification for the Independent Commission of Investigations. ■

SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE

INTRODUCTION

Social development as an integral aspect of the country's growth and advancement was underscored throughout the review period, as national systems for information, social service delivery and welfare were put to the test in 2020. The Coronavirus Disease (COVID-19) pandemic hit Jamaica in the middle of the first quarter, and became the direct or indirect focus of social services for the remainder of the year. The guiding framework for social interventions continued to be the Vision 2030 Jamaica – National Development Plan, with supporting policy, and institutional and monitoring frameworks for health, education, social protection, and poverty reduction, inter alia. The impact of and fallout from the pandemic affected employment, livelihoods, mobility of resources, and inclusion. The risks of losing social gains that had been advanced over time were high, as the global crisis manifested itself in disruptions to various supply chains, loss of international and local markets leading to loss of employment and revenues, and deleterious impacts on business activity. Across the age cohorts, these impacts were experienced in various ways, and government sought to lessen negatives and social losses through the extension of responsive interventions.

For the year, the focus areas for children included their care and protection, access to schooling and resources for education, and continued legislative and regulatory reforms. Amid the challenges brought about by the pandemic, state and non-state actors made an effort to minimize the impact of necessary operational adjustments in the provision of standard services and execution of crucial projects, while strengthening partnerships to meet new and increased demands of the child population. Youth-related interventions were focused on skills training, livelihood interventions and empowerment, within a diverse and emerging set of work modalities and opportunities.

Policy and legislative reforms in the area of gender focused on ongoing debate on the Sexual Harassment Bill within the Joint Select Committee of Parliament, as well as initiation of a review of the National Policy on Gender Equality. The status and impact of gender-based violence in the context of the pandemic were also of critical

importance in framing programmatic responses. To strengthen the anticipated effectiveness of the Disabilities Act, work was advanced on the Regulations and pertinent Codes of Practice. The quality of life of senior citizens, their protection and safety in light of the pandemic, coordination of the delivery of benefits and services, and livelihood interventions were the major thrusts in support of the elderly population. Poverty reduction focused on improving collaboration and partnerships for improved reach and delivery, as well as identification of persons needing support. Work was advanced on the institutional framework for coordination, monitoring and evaluation of the national programme.

Post the general elections in September 2020, the Ministry of Local Government and Community Development was renamed the Ministry of Local Government and Rural Development. Local Development focused on strengthening governance structures and broader social development, including community development efforts towards social infrastructure and improvement of community amenities. Under the Disaster Risk Management Act, the ministry coordinated and led national policy actions in support of the public health crisis created by the pandemic. Social protection efforts were largely centred on effecting welfare responses to vulnerable groups within the population, facilitating delivery of benefits and services in ways that limit physical contact or crowding, and accommodating client services to offset risks to income security. For the year, social security and welfare programmes provided benefits and services to larger numbers of beneficiaries. Notable were the extra payment of cash transfers to families on the Programme of Advancement Through Health and Education (PATH) in May, under the extensive COVID Allocation of Resources to Employees Programme (We CARE) initiated by the Ministry of Finance and the Public Service in March. Alongside the cash transfer and in-kind benefits, government through the Ministry of Local Government and Rural Development and Ministry of Labour and Social Security and their agencies enhanced services and provisions to various vulnerable populations. Non-governmental organizations, private sector and civic bodies greatly supported the welfare initiatives and

TABLE 25.1
SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE
RECURRENT AND CAPITAL BUDGET BY PROGRAMME, 2019/2020 – 2020/2021
(\$'000)

PROGRAMME	REVISED ESTIMATE 2019/2020	APPROVED ESTIMATE 2020/2021
RECURRENT		
Ministry of Education, Youth and Information		
Child and Youth Development Programme	174 339.0	232 178.0
Child Protection and Family Services Agency (CDA/OCR) ^a	2 763 338.0	2 923 487.0
Student Nutrition	6 156 759.0	6 873 365.0
Early Childhood Development	3 666 691.0	3 830 396.0
Minsitry of Culture, Gender Entertainment and Sport		
Social Welfare Services (Gender Welfare)	518 179.0	491 578.0
Art and Culture (promotion and preservation of)	1 766 209.0	2 207 156.0
Ministry of Labour and Social Security		
Social Security and Welfare Services ^b	2 179 531.0	3 218 800.0
Office of the Children's Advocate		
	201 331.0	207 234.0
Ministry of Local Government and Community Development		
Social Security and Welfare Services (Poor Relief Services) ^c	905 090.0	1 763 293.0
Community Development (Housing and Community Amenities) ^d	8 392 701.0	8 940 376
Solid Waste Management	2 325 006.0	2 182 783.0
Improvement of Road and Structures	100 000.0	100 000.0
Ministry of Industry, Commerce, Agriculture and Fisheries		
Youth agriculture and entrepreneurship development (Ja. 4-H Clubs)	279 008.0	286 922.0
CAPITAL		
Ministry of Local Government and Community Development		
Social Security and Welfare Services (assistance to homeless people)	28 000.0	28 000.0
Community Development (Housing and Community Amenities)	1 644 256.0	2 189 356.0
Solid Waste Management	320 000.0	
Ministry of Labour and Social Security		
Social Security and Welfare Service ^e	8 347 410.0	8 596 012.0
Office of the Prime Minister		
Jamaica Social Investment Fund (JSIF)	3 698 522.0	4 014 562.0
GRAND TOTAL	43 466 370.0	39 145 122.0

a – This allocation includes amounts for government-operated Children's Homes, Places of Safety, Foster Care, Ananda Alert and the Office of the Children's Registry.

b – Social Security and Welfare Services deal with the administration of the National Insurance Scheme, Public Assistance, social intervention programmes, poor relief services, and programmes for persons with disabilities and the elderly.

c – Social Welfare Services include provisions to the Board of Supervision for the Poor Relief, Homeless and golden age programmes.

d – This covers service activities covered by ODPEM, the Jamaica Fire Brigade and the Social Development Commission.

e – This covers three projects: the Integrated Social Protection and Labour Programme; the Social Protection Project II and the Integrated Support to the Jamaica Social Protection Strategy.

Source: Estimates of Expenditure 2020/2021 for Financial Year Ending March 2020/2021 (as presented in the House of Representatives), Ministry of Finance and the Public Service

accommodation of clients in various ways. The Ministry of Culture, Gender, Entertainment and Sport maintained its commitment to cultural assets and the management of cultural programmes and provisions, despite restrictions that resulted in significant closures and curtailment across the sector. Major national commemorations and events were shifted to virtual formats.

FINANCING

The GOJ earmarked approximately \$39.1 billion for select social development, social protection and cultural programmes for the fiscal year (FY) 2020/21 (Table 25.1).

Social Development (Select Programmes)

Children and Youth

The Ministry of Education, Youth and Information (MOEYI) received an allocation of \$2.9 billion for the operation of the Child Protection and Family Services Agency (CPFSA), which now includes the Office of the Children's Registry (OCR).¹ The Office of the Children's Advocate (OCA), a commission of Parliament, received an allocation of \$207.2 million toward the protection and enforcement of the rights of all children in Jamaica. Nutritional support to the most vulnerable students in public schools was provided through the School Feeding Programme; approximately \$6.8 billion was allocated to this programme. There was an allocation of \$3.8 billion for early childhood development. A provision of approximately \$232.1 million was apportioned to the MOEYI for youth development programmes in the Recurrent Budget. A total of \$286.9 million was allocated to the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAF) for the promotion of youth involvement in agriculture and entrepreneurship through the Jamaica 4-H Clubs.

Gender

Approximately \$491.6 million was allocated to the Ministry of Culture, Gender, Entertainment and Sport (MCGES) for social security and welfare services. The majority of the allocation (\$354.7 million) was to the Women's Centre of Jamaica Foundation (WCJF). Included in the allocation for the WCJF was \$7.5 million for the national shelter. The Bureau of Gender Affairs (BGA) was allocated \$121.0 million for its programmes and operation, and \$15.8 million was apportioned as grants to its non-governmental

organization (NGO) partners.

Community Development

The Ministry of Local Government and Community Development (MLGCD)² was allocated \$13.5 billion from the Recurrent Budget, \$2.6 billion of which was apportioned to support the Local Authorities to ensure greater efficiency in the delivery of services. A total of \$8.9 billion was allocated to community development services offered by the Office of Disaster Preparedness and Emergency Management (ODPEM), the Jamaica Fire Brigade and the Social Development Commission (SDC). The Board of Supervision was given \$1.7 billion for poor relief services. The Jamaica Social Investment Fund (JSIF), an agency of the Office of the Prime Minister, received \$4.0 billion in the Capital budget to support community-based poverty alleviation interventions.

Social Protection (Select Programmes)

Approximately \$3.2 billion was apportioned to the Ministry of Labour and Social Security (MLSS) for Social Security and Welfare Services under the Recurrent Budget. This allocation includes \$735.0 million for the direction and administration of the National Insurance Scheme (NIS); and \$932.7 million for social welfare services, including support to the elderly. A total of \$800.0 million was allocated to support the introduction of a targeted social pension programme for the elderly who are not covered by any contributory-based schemes. There was an allocation of \$305.5 million for public assistance and support to other vulnerable groups including those nutritionally at risk and victims of various misfortunes. Allocation for support to persons with disabilities included:

- Jamaica Council for Persons with Disabilities (\$194.0 million)
- Early Stimulation Programme for children with disabilities 0–6 years (\$117.9 million)
- Abilities Foundation (\$15.1 million)

The MLSS also received in its Recurrent Budget an allocation of \$118.6 million for the Social Intervention Programme—formerly Special Youth Employment and Training Project—to promote youth employment, skills training, and empowerment for persons 18–25 years. Approximately \$8.5 billion was allocated to the MLSS under the Capital budget for social protection services implemented through support from the Inter-American

1. The Office of the Children's Registry (OCR) and the CDA were merged in 2017 and operate under the name Child Protection and Family Services Agency.

2. The Ministry of Local Government and Community Development was renamed the Ministry of Local Government and Rural Development in September. Notwithstanding, the ministry will be referred to as the Ministry of Local Government and Community Development as referenced in the Estimate of Expenditure.

Development Bank's Integrated Support to the Jamaica Social Protection Strategy.

Culture (Select Programmes)

A total of \$2.2 billion was allocated to the MCGES for the promotion of arts and culture. Of this amount, \$1.1 billion was apportioned for the development and promotion of the creative industries; \$637.9 million for cultural protection and preservation; \$178.4 million for cultural information and education; and \$375.5 million for the conservation and preservation of heritage assets.

CHILDREN (0 TO UNDER 18 YEARS)

The 2019 population estimates for the age cohort show that children make up just over a quarter (25.7 per cent) of the total population, for a total of 701 380, comprising 356 110 males and 345 270 females. The immediate effects of limited face-to-face instruction and other COVID-19-related national restrictions were far-reaching and complex, with implications that extended beyond learning loss. Examples included declining mental health and poor nutrition³—the long-term effects of which may only begin to manifest in years to come. Direct effects threatened the Three P's of participation, provision and protection rights, reflected in the scaling down of annual children's events, interruptions to access to education, and suspected increase in cases of abuse and neglect. Amid the challenges, state and non-state actors made efforts to minimize the impact of necessary operational adjustments in the provision of standard services and execution of crucial projects, while strengthening partnerships to meet new and increased demands of the child population. In addition to highlighting the importance of partnership and collaboration, the extraordinary demands created by the global crisis brought to the fore the commitment of international development partners (IDPs) in responding to the needs of the country (see chapter on Official Development Assistance).

Legislation, Policy and Research

The pandemic stimulated much research activity that included investigations into the impact of COVID-19 on children. These investigations, along with studies

previously initiated, made for a year of useful insights into pertinent issues affecting the child population. An assessment on the impact of the pandemic on children was conducted with support from UNICEF.⁴ The assessment surveyed 500 households with children islandwide and identified several challenges created by the pandemic. Study results pointed to: increased use of harsh disciplining methods in the home (which was higher within households reporting a reduction in income); an increase in children's levels of anxiety, fear, frustration, and depression; reductions in income of households; and household food shortages with a prevalence rate that was higher among female-headed households. Results of a rapid assessment of JA Kids⁵ families raised similar concerns, with an emphasis on the increased burden of childcare for mothers. Over 70.0 per cent of parents expressed a desire for greater parental support, particularly with respect to meeting the educational needs of their children, while 65.9 per cent expressed a desire for direct financial support due to loss of income.

Jamaica was one of eight countries that benefited from a USAID-UNICEF supported project that included a study mapping the current national capacity and provision of comprehensive care for children with Congenital Zika Syndrome and other congenital malformations. The report, which was launched in early 2020, pointed to the policy and legislative environment, as well as access to healthcare and education, as areas of strength in support of children with disabilities. Systemic challenges were also identified, relating to: the implementation of policies and laws; inadequate coordination of programmes and services; and pervasive stigma and discrimination that hinder early screening and intervention. The report was aimed at informing the mainstreaming of childhood disability and inclusion within the overall early childhood development programming for the country.

To ensure that parenting interventions continue to reflect best available evidence and lessons from context and experience, formative research on parenting was completed. Findings were used to develop country-specific training, as well as Information, Education and Communication (IEC) material on positive and gender-sensitive parenting. IEC resources included the adaptation of an online parenting messaging system, a community-based training package

3. World Bank, *Acting Now to Protect the Human Capital of our Children: The Costs of and Response to COVID-19 Pandemic's Impact on the Education Sector in Latin America and the Caribbean* (Washington, DC: World Bank, 2021), <https://openknowledge.worldbank.org/handle/10986/35276>

4. UNICEF Jamaica, *The Effect of the COVID-19 Pandemic on Jamaican Children Preliminary Results*, 2020, <https://www.unicef.org/jamaica/reports/effect-covid-19-pandemic-jamaican-children-preliminary-results>

5. JA Kids is the popular name used in reference to the Jamaican Birth Cohort Study 2011, which is a national longitudinal study of children born during the period July 1, 2011 to September 30, 2011. The study is being conducted by the Department of Child and Adolescent Health of The University of the West Indies.

targeted at parents with children from birth to 18 years, a national parenting support website, and a curriculum-based parenting programme for adolescent mothers. The roll-out of these interventions was part of the EU-funded Spotlight Initiative, aimed at addressing family violence.

Participation

In spite of the limitations presented by physical distancing and other COVID-19 protocols, the Child Protection and Family Services Agency (CPFSA) made efforts to ensure children's participation rights were exercised, through its 45-member Children's Advisory Panel.⁶ Members took part in the nationally televised town hall forum on the National Plan of Action for an Integrated Response to Children and Violence (NPACV), and six members of the Panel were selected to give representation on the Technical Working Groups that oversee the implementation of the NPACV. Additionally, as part of the plan of the CPFSA plan to establish a child helpline, 16 members of the Panel participated in focus group sessions to provide inputs on the process.

The annual Caribbean Child Research Conference proceeded, in the virtual space, on November 25–26. The 15th staging of the event was hosted by the Cave Hill campus of the Sir Arthur Lewis Institute of Social and Economic Studies (SALISES), under the theme “Pandemics and Children's Rights”. The conference featured presentations from adult and child participants on research touching a range of child-related issues, as well as the promotion of children's rights, as articulated in the UN Convention on the Rights of the Child.

Early Childhood Development

According to the 2019 end of year estimates, the early childhood cohort (children 0–8 years old) comprised 45.9 per cent of the child population and 11.8 per cent of the total population, to number 321 830 (164 085 boys). Generally, services to children at the early childhood level centre chiefly around education and health. While there is no legal obligation for children at the pre-primary stage to attend an early childhood institution (ECI), the maintenance of near universal enrolment of 3–5 year olds reflects the strong custom of enrolment of this age group

in some form of educational institution, extending into the primary level (6–8 years). In contrast, around 11.0 per cent of children under age three attend an ECI,⁷ making the health care system the main service point for the youngest.

Through the efforts of the Early Childhood Commission (ECC), the disruptions caused by COVID-19 restrictions were addressed through a number of initiatives focused on parental support and facilitating maintenance of children's play and learning activities. These initiatives took the form of: virtual Parent Places; the distribution of 800 early learning and play kits to children in quarantined communities; the provision of activity plans, games and tips online; and the airing of live early childhood lessons each weekday on local television. Other provisions and sector advancements were in line with the strategic areas of the National Strategic Plan 2018–2023 for early childhood development. These included:

- **Safe and effective parenting** – 48 of 74 Parent Places received certification from the National Parenting Support Commission. Over the course of the year, 2 945 parents attended the counselling, training and information sessions held at these locations.
- **Effective preventive health care for 0–6 year olds** – the Child Health and Development Passport⁸ was redesigned following an evaluation of its effectiveness and implementation.
- **Early and effective screening, diagnosis and intervention for at-risk children and households** – the Jamaica School Readiness Assessment for four year olds (also referred to as the Age 4 Assessment) was evaluated and a sustainability plan developed, which includes a Monitoring and Evaluation framework for annual assessment and distribution of results.
- **Safe, learner-centred, well-maintained ECI facilities** – the rate of ECI compliance with regulations was at a record high, with 2 534 (94.8 per cent) of the 2 674 ECIs islandwide applying for a Certificate of Registration;⁹ 16 ECIs received certificates during the year for a total of 271 certified institutions islandwide; a permit to operate was issued to 26 ECIs, bringing the total number of permits issued to ECIs in operation to 2 248.
- **Effective curriculum delivery by trained early childhood development practitioners** – of the 12 394 ECPs engaged in ECIs, 5 517 (44.5 per cent) were

6. The Children's Advisory Panel was established in 2012 as a channel for children's input in decision-making and to provide guidance to the CPFSA on matters relating to child-centred national policies, programme design and development.

7. World Bank, *Jamaica Early Childhood Development: SABER Country Report. Jamaica 2013* (Washington DC: World Bank Group, 2013), <http://documents.worldbank.org/curated/en/884611468040480675/SABER-early-childhood-development-country-report-Jamaica-2013>

8. The Child Health and Development Passport was introduced into the health-care system as the primary tool for the monitoring and risk screening of all children from birth to age 17.

9. A Certificate of Registration is a legal requirement, under the Early Childhood Act (2005), for the operation of an ECI.

qualified at NVQ-J Level III or above;¹⁰ 101 early childhood practitioners (ECPs) were trained by ECC staff in the use of the Irie Classroom Toolbox;¹¹ weekly training in curriculum implementation was provided to 3 419 ECPs; of the 2 090 ECIs whose teaching and learning environment was assessed, 1 092 (52.2 per cent) were found to be effectively implementing the standard curriculum.

- **Timely, clear, current, appropriate, evidence-based information to support ECD** – the annual sector review was completed, providing to the public a general overview of the achievements and challenges of the sector for each financial year, from 2013 to 2020.

The Commission continued to invest heavily in the professional development of ECPs, recognising teacher qualification as an area for improvement within the early childhood development sector. During the year, the following training sessions were conducted:

- weekly curriculum delivery training facilitated by ECC Development Officers; 5 899 ECPs attended curriculum training for the 4–5 age cohort, while 2 667 attended sessions for the 0–2 age cohort
- Core Skills training (e.g. Collaboration and Communication; Citizenship) facilitated by the British Council; 46 zone lead teachers participated
- two workshops, in St James and Kingston, focused on “Loose Parts Play”, were hosted by lecturers of George Brown College (Canada); 244 ECPs attended
- individualized support provided at Early Childhood Resource Centres to ECPs whose classroom assessment showed ineffective implementation of the standard curriculum.

The sector received additional teacher support through provisions under the HOPE and Temporary Trained Teacher (TTT) programmes that allow for temporary employment of trained teachers, with scope for permanent engagement. For the 2019/2020 academic year, 29 trained Teaching Assistants were employed under the HOPE programme and 210 teachers were assigned to basic schools and infant departments under the TTT programme.

Children At Risk

As the periodic suspension of face-to-face classes and restrictions to movement continued, several entities expressed concern regarding a potential increase in the incidence of violence against children, neglect, exploitation and other threats to children’s safety. The overshadowing effect of COVID-19, therefore, should be kept in mind in the interpretation of the data that follow.

Child Abuse, Sexual Offences and Missing Children

The National Children’s Registry (NCR) is the unit within the CPFSA that receives child abuse reports and makes referrals to its Investigation Services Unit, as well as external entities, such as the Office of the Children’s Advocate and the Centre for Investigation of Sexual Offences and Child Abuse (CISOCA).¹² A total of 9 481 such referrals were made during the year.¹³ The preliminary data for January to December indicated that 9 883 reports were received by NCR—a decrease of 28.4 per cent compared with the same period in 2019. A third of reports were received during the first three months of the year. The quarter that showed the most significant change, compared with 2019, was the April to June quarter, for which the average monthly intake was almost 50.0 per cent lower—623 reports in 2020 compared with 1 224. The decline in reports remains a concern as, prior to the onset of COVID-19, the NCR received an average of 1 000 reports of child abuse per month. The suspected underreporting led the CPFSA to initiate a series of activities to raise awareness of the effects of child abuse, the importance of making reports, and how to prevent or respond to incidents of abuse. These included online advertisements on reporting child abuse, a virtual child protection forum, and public service announcements.

Despite the reported decline, the pattern in the number of reports by category remained similar to the previous year. Of the 19 242 reports by category, ‘behaviour problem’ was the most common at 27.5 per cent, followed by ‘neglect’ (21.6 per cent), and ‘otherwise in need of care and protection’ (17.2 per cent) {Table 25.2}. Of note, reports of child trafficking almost doubled for a total of 23 compared with 12 in the previous year. ‘Child labour’ was the only other category that showed an increase in reports, which went up to 299 from 285—an increase of 4.9 per cent.

10. A trained teacher, as defined in the Early Childhood Regulations (2005), is “a person who has, at minimum, been issued a diploma by a recognized teacher training college . . .”

11. Irie Classroom Toolbox is an early childhood violence prevention teacher-training programme that aims to reduce violence against children by teachers and prevent the early development of antisocial behaviour in children aged 3–8 years. Helen Baker-Henningham, et al., “The Irie Classroom Toolbox, a universal violence-prevention teacher-training programme, in Jamaican preschools: a single-blind, cluster-randomised controlled trial” (Lancet Global Health, 2021), 9.

12. Reports of sexual abuse are referred to the CPFSA Investigation Services Unit before being handed to CISOCA, as may be necessary.

13. A report may be referred to multiple investigating entities, depending on the nature of the case.

TABLE 25.2
REPORTS RECEIVED AT THE NATIONAL CHILDREN'S
REGISTRY BY CATEGORY^a
JANUARY TO DECEMBER 2020

CATEGORY OF REPORTS RECEIVED	NUMBER	PER CENT OF TOTAL
Physical Abuse	2 531	13.2
Sexual Abuse	2 481	12.9
Emotional Abuse	1 172	6.1
Neglect	4 148	21.6
Child Labour	299	1.6
Child Trafficking	23	0.1
Behaviour Problem	5 284	27.5
Child Care and Protection ^b	3 304	17.2
Total	19 242	100.0

a – A single report may fall under more than one category

b – Care and protection matters that do not constitute an abuse report

Source: Child Protection and Family Services Agency

The CPFSA Investigation Services Unit received 10 028 cases—a 23.6 per cent reduction compared with the previous year. A total of 905 of these cases were received through the CISOCA offices. Although there was a 10.3 per cent decline in the number of investigations completed, for a total of 12 281 (inclusive of cases brought forward and backlogs), there were fewer cases (975) that remained active or at varying stages of completion at the end of 2020 compared with the previous year (3 624).

Jamaica Constabulary Force (JCF) statistics on children involved in Category One crimes¹⁴ showed that child victims numbered 476 (75.4 per cent girls) while 202 children were arrested (95.6 per cent boys) {see chapter on National Security and Justice}. Rape was the category of crime that had the highest number of child victims (298; all girls) and children arrested (58; all boys), representing 62.6 per cent and 28.7 per cent of all child victims and those arrested, respectively. The largest proportion of child victims of rape was girls aged 15 (17.4 per cent), and it was the most common form of sexual offence against children, accounting for 41.6 per cent of all sexual offences against children. This was followed by 'grievous sexual assault' (28.9 per cent) and 'sexual touching/interference' (18.3 per cent).

'Shooting' had the second highest number of child victims, accounting for 14.9 per cent (71 victims) of all

Category One crimes against children. Boys were more likely to be victims of shooting than any other crime, having the highest number of male victims (53) and accounting for 74.6 per cent of child shooting victims.

According to the Ananda Alert secretariat, 1 066 children (863 girls) were reported missing—a decrease of 30.9 per cent. By the end of the year, 843 (696 girls) were accounted for, while 217 (176 girls) remained missing. Six children (5 boys; 1 girl) were found dead. As part of efforts to recover missing children, the CPFSA maintained its partnership with the US-based International Centre for Missing and Exploited Children. Through this partnership, the Agency has access to the Global Missing Children Network and its database. The partnership also facilitates the creation of Google alerts, targeting any specified geographic location. By extension, through a technology called GMCNgin, the posting of alerts initiates a facial recognition software that searches the web (including the Dark Web) for photos of the missing child—an important tool in high alert or high risk cases.

Children in Care

An area of focus of the CPFSA has been to reduce the number of children in care through its Children and Family Support Unit (CFSU). The work of the CFSU is to reduce the number of children entering the care of the state, by providing support to families whose circumstances do not necessitate the involvement of the courts. A total of 3 620 children and their families were served through the CFSU and received counselling, referrals to and follow-ups with other strategic partners that helped in building the capacity of families to take better care of their children. Approximately 1 592 children were discharged from the unit, as a result of families being taken out of at-risk situations.

As at the end of December, there were 4 467 children (2 234 girls) in care, 5.8 per cent (156 boys) of whom were living in government-owned residential care facilities (Table 25.3). There was a 4.3 percentage point increase in the proportion of children who were living in familial environments,¹⁵ accounting for 63.8 per cent of children in care compared with 59.5 per cent in 2019 (Table 25.4). A total of 646 children entered the child protection system during the year, of which 313 were placed in Foster Care, 168 in Family Reintegration, and 165 in Children's Homes. In addition, the cases of 42 children who were in Places of Safety were assessed and the children subsequently placed in a Children's Home. Requests for emergency

14. Category One Crimes are murder, shooting, rape, aggravated assault, robbery, break-in and larceny (see chapter on National Security and Justice).

15. Care categories that are considered familial environments are Foster Care, Family Reintegration and Supervision Order.

TABLE 25.3
POPULATION OF CHILDREN IN GOVERNMENT
INSTITUTIONS AS AT DECEMBER 2020

INSTITUTION	MALE	FEMALE	TOTAL
The Father's House Children's Home for Girls	0	12	12
Summerfield Children's Home for Girls	0	26	26
Muirton Boys' Home	45	0	45
Manning Boys' Home	45	0	45
Granville Place of Safety for Girls	0	31	31
Homestead Place of Safety for Girls	0	39	39
Glenhope Nursery Place of Safety	20	11	31
Blossom Gardens Child Care Facility	24	11	35
St Augustine Boys Place of Safety	22	0	22
Total	156	130	286

Source: Child Protection and Family Services Agency

placements¹⁶ numbered 502, of which 42.6 per cent was placed in a Place of Safety or Children's Home while other interventions were provided for the remaining requests. There were 1 012 foster homes available at the end of the year.

During routine police lock-up monitoring activities by the CPFSA, 92 children were found and appropriate actions taken. These actions included: counselling; arrangements for bail and release to parents or guardians; relocation of children in need of care and protection to Places of Safety; and facilitation of requests for spaces in Places of Safety

for children in conflict with the law. In addition to its monitoring activities, the CPFSA received approximately 156 notifications of children in lock-ups from the Lock-Up and Detention Report, issued by the JCF three times per week.

A total of 142 adoption applications were received for wards and non-wards of the state, and 99 adoption applicant assessments were completed. In terms of total number of adoptions for the year, 14 wards of the state and 81 non-wards were adopted. Additionally, 89 adoption orders were granted and six adoption licences issued.

The USAID-funded Transitional Living Programme for Children in State Care, which was due to end in August 2020, was granted a four-month extension, due to interruptions caused by the pandemic. The extension allowed for the achievement of the following against set targets:

- training of 514 caregivers (445 females) in Life Skills Coaching techniques (target was 500)
- coaching in Life Skills provided to 957 (530 females; 424 males; 3 not stated) youth in care (target was 900)
- training of 40 officers as Life Skills trainers and 41 officers in Trauma-informed Care (targets were 40 and 50, respectively)
- distribution of 325 starter kits (target was 400 each)
- completion of vocational skills programmes by 520 youth (343 females; target was 500)
- engagement of 122 youth (80 females) who completed vocational skills training in new employment (target was 92)

TABLE 25.4
POPULATION OF CHILDREN IN CARE BY REGION AND PLACEMENT CATEGORY FOR QUARTER ENDING
DECEMBER 31, 2020

REGION	FOSTER CARE			FAMILY REINTEGRATION			CHILDREN'S HOME			PLACE OF SAFETY			SUPERVISION ORDER			OTHER			TOTAL		
	M	F	T	M	F	T	M	F	T	M	F	T	M	F	T	M	F	T	M	F	T
South East	203	245	448	186	160	346	430	285	715	15	33	48	181	225	406	47	82	129	1 062	1 030	2 092
North East	80	94	174	36	36	72	1	27	28	1	1	2	69	82	151	3	6	9	190	246	436
Western	124	144	268	94	93	187	83	80	163	18	19	37	156	183	339	34	28	62	509	547	1 056
Southern	115	121	236	57	68	125	193	116	309	22	0	22	38	62	100	47	44	91	472	411	883
TOTAL	522	604	1 126	373	357	730	707	508	1 215	56	53	109	444	552	996	131	160	291	2 233	2 234	4 467

Source: Child Protection and Family Services Agency

16. These are requests received by Children's Officers from parents who have decided that they can no longer cope with or meet the care and protection needs of their children and are seeking, as a last resort, the assistance of the Agency. These cases are usually dire, are processed within 24–48 hours, and do not pass through the Courts in the initial phase. The children are housed in a Place of Safety or temporary foster home, or are placed with other relatives for further intervention to be provided, while awaiting a decision of the Court.

- awarding of entrepreneurship training and financial support to 29 youth (20 females; target was 5)
- placement of 37 youth (31 females) in transitional housing complexes, which was affected by physical distancing requirements that eliminated the double occupancy options (target was 52)
- mentorship of 76 youth in transitional housing and others transitioning out of care (target was 52).

A longitudinal study on the outcomes of young adults who are housed in independent (transitional) living facilities was also built into the project and will continue beyond its close. By the end of the year, baseline data collection was completed and a report prepared by the Caribbean Child Development Centre—managers of the project.

Child and Adolescent Mental Health

The Ministry of Health and Wellness provides child and adolescent mental health services through its 21 Child Guidance Clinics across the island (see chapter on Health). The CPFSA also continued to provide psychological and counselling services to children in care, and as part of interventions to prevent children from entering the tertiary child protection system. Individual psychotherapy sessions were conducted with 983 children in care and 53 psycho-educational sessions were held with 102 staff.¹⁷ The team assigned to the Mobile Mental Health Unit (also known as the Smiles Mobile) screened 571 children. As part of the preventative work of the Children and Family Support Unit, 4 707 children and 2 587 adults (inclusive of parents, guardians and caregivers) were engaged in counselling sessions. Additional psychosocial support to children and their caregivers was provided in the form of a Drumming Therapy Circle Project facilitated by the CPFSA in six children's homes and places of safety, in collaboration with the Violence Prevention Alliance. The programme was aimed at reducing tension, anxiety and stress, as well as boosting physical healing. Over 16 caregivers were trained as trainers and the homes supplied with drums and other instruments.

YOUTH (15–24 YEARS)

The changes in the demographic structure of the Jamaican population was evidenced by the declining trend in the youth population. The youth population totalled 483 200, which was approximately 17.7 per cent of the total population. Compared with the previous year, the youth

population remained relatively stable (483 074 youth). The estimates showed that there were more males (245 700) than females (237 500) in this category. The average youth unemployment rate was 25.9 per cent. During the reporting period, there were 10 752 'unattached youth'¹⁸ not enrolled in a school or skills-training institution and/or were not working. Currently, positive youth development in all areas of the economy and society is among the key priorities of both government and civil society. Key priorities for the youth sector included the increase in access to training and certification of youth in skills-training programmes, as well as job placement and volunteerism.

Human Employment and Resource Training/National Service and Training Agency Trust (HEART/NSTA Trust)

Technical vocational education and training in Jamaica is offered by the lead agency, HEART/NSTA Trust. The Trust is tasked with creating a vibrant, dynamic, inspired, highly competent and productive labour force, which is responsive to the demands and complexities of the modern workplace through the provision of Technical Vocational Education and Training.¹⁹

The 2019/2020 financial year saw the Trust recording enrolment of 141 748 persons, of which 68 482 (48.0 per cent) were youth. Total certification was 50 599, with youth representing 23 680 (47.0 per cent). Of the enrolled (68 482) and certified (23 680) youth cohort, the majority was female, 40 468 (59.0 per cent) and 14 750 (62.0 per cent), respectively (Table 25.5). From a regional standpoint, the parish cluster of Kingston, St Andrew, St Catherine, and St Thomas recorded the highest in both enrolment and certification.

There are several youth-related programmes offered by the Trust, some of which target individuals outside of the age defined youth cohort (15–24 years). Programmes which offer skills training opportunities to young people include:

School Leavers Training Opportunity Programme (SLTOP) – This programme offers young people the experience necessary to develop a greater understanding of the complexities of the working environment and provides some of the tools required to become competitive members of the labour force. Trainees immerse themselves in the daily operations at the location of their employment for the duration of one to three years.

During fiscal year 2019/2020, a total of 1 743 persons were enrolled, with 546 attaining certification. A stipend is provided and trainees are certified upon successful

17. Staff members may have benefited from more than one session.

18. Unattached youth is defined by the National Youth Policy (2004) as those youth that are not employed, not enrolled in school, and not engaged in any other form of training.

19. About – HEART/NSTA Trust. 2021. *HEART-NSTA.org*, <https://www.heart-nsta.org/about/>

TABLE 25.5
YOUTH ENROLMENT & CERTIFICATION BY SEX AND REGION
APRIL 2019 – MARCH 2020

	ENROLMENT			CERTIFICATION		
	M	F	TOTAL	M	F	TOTAL
Clarendon, Manchester and St Elizabeth	5 728	9 708	15 436	1 852	3 632	5 484
17–24	4 837	7 365	12 202	1 457	2 724	4 181
25–29	891	2 343	3 234	395	908	1 303
Hanover, St James, Trelawny and Westmoreland	5 368	7 642	13 010	2 068	2 951	5 019
17–24	4 579	5 824	10 403	1 657	2 181	3 838
25–29	789	1 818	2 607	411	770	1 181
Kingston, St Andrew, St Catherine and St Thomas	13 271	17 027	30 298	3 927	5 921	9 848
17–24	10 896	12 838	23 734	3 073	4 421	7 494
25–29	2 375	4 189	6 564	854	1 500	2 354
Portland, St Ann and St Mary	3 647	6 091	9 738	1 083	2 246	3 329
17–24	3 126	4 709	7 835	902	1 682	2 584
25–29	521	1 382	1 903	181	564	745
Grand Total	28 014	40 468	68 482	8 930	14 750	23 680

Source: HEART/NSTA Trust

completion of the programme assessment. SLTOP targets recent school leavers (ages 17–23) with two or more passes in CXC General (1, 2, 3) or GCE (A, B, C) or its equivalent.

The Housing Opportunity Production and Employment (HOPE) – National Service Corp Programme (NSCP) – The HOPE programme targets unattached at-risk youth from ages 18 to 24 who are vulnerable to getting involved in crime and who are not engaged in any meaningful way. During the review period, 3 582 youth were enrolled in the NSCP.²⁰ The expected outcome of the programme included: improving the level of professional development among Jamaicans; increasing self-confidence and psychosocial well-being; assisting in crafting career goals and in fostering increased levels of qualification for the labour market; and improving the general employability skills.

Youth Employment in the Digital and Animation Industry (YEDAI) – Administered through the HOPE Programme, the YEDAI Project is in collaboration with the HEART/NSTA Trust and is geared at promoting and optimizing growth and development for unattached youth

in Jamaica. Employability and entrepreneurship are a part of the project aimed at upskilling youth within the labour force through training in digitization and document management. During the review period, 6 121 youth were enrolled in the YEDAI programme and, of that number, 1 543 were certified and 4 248 placed in jobs.

National Unattached Youth Programme (NUYP) – Commenced in January 2015 with the goal to “Improve livelihood through the skill intervention and training of unattached youth”. The programme targets youth, ages 17–30 years, across the island. The programme methodology included apprenticeship, skills training, and pre-technology.²¹ Execution of the programme is carried out through Community Training Intervention (CTI) Programmes, Secondary Schools, Community Centres and Non-Governmental Organizations across Jamaica. Total enrolment under the NUYP was 10 752 youth, while certification totalled 2 775 youth. By sex, enrolment was 30.4 per cent male and 69.6 per cent female. Of those enrolled, 19.8 per cent males and 28.4 per cent females were certified.

20. One component of the HOPE Programme is the National Service Corps Programme (NSCP). It is in part a training and apprenticeship/internship programme that provides an avenue for the development of fully rounded individuals, through a system of National Service Corps (specific skill areas) to become productive members of society. HOPE works in conjunction with the HEART/NSTA Trust as the main mechanism for recruiting, training, and certifying the participants.

21. Programme Design

This programme is designed with the methodology as outlined hereunder:

- ✓ Apprenticeship – to bridge the gap between school and the world of work
- ✓ Skills Training – National Vocational Qualification of Jamaica (NVQ-J) up to Level 2 certification
- ✓ Pre-Technology – to facilitate core academic subjects (Mathematics & English) and the introduction to technical skills.

The HOPE Youth Summer Work Programme – Formerly the National Youth Service (NYS), the HOPE Youth Summer Work Programme is now implemented under the HEART/NSTA Trust. The programme is aimed at providing youth with work experience for three weeks during the months of June, July and August. Work experience provided through the programme is offered to youth aged 17–29 years. Youth placed in a place of work under the programme totalled 16 627.

Graduate Work Experience Programme (GWEP) – A total of 293 youth benefited from placement under this programme. The programme targets unemployed graduates 17–29 years, with little to or no experience in their field of study for a six-month period. A stipend is provided by the Trust. Graduates are able to gain knowledge of the working environment and develop personal and professional experience. Participants of GWEP are youth with a degree or an associate degree from a tertiary institution.

The Apprenticeship Programme – Support geared towards expanding and improving MSMEs was provided by the Trust. A total of nine micro, small and medium-sized enterprises (MSMEs) were approved for funding by the Board of Directors of HEART/NSTA Trust during the 2019/2020 financial year. During the period, five entrepreneurial incubators to promote entrepreneurship among trainee cohorts were established. These incubators were located at the Ebony Park Academy, HEART College of Construction Services, HEART College of Innovation and Technology, HEART College of Hospitality Services, and HEART College of Beauty Services. Through the Rural Youth Economic Empowerment Programme (RYEEP), a total of 110 participants benefited from \$7.5 million in grants. The RYEEP is a four-year programme supporting rural underemployed, unemployed, or unattached youth ranging from ages 18 to 35 years across Jamaica. The programme targets youth by providing them with entrepreneurial opportunities that will raise their abilities to develop, nurture and grow agricultural-based enterprises.

Kingston YMCA

The activities of the YMCA were affected by the COVID-19 pandemic. The observance of government-issued protocols resulted in the cancellation of several activities and the closure of the centre. Beneficiaries of the Youth Development Programme²² encountered a number

of challenges with the restriction of face-to-face classes aimed at slowing the spread of the virus. Youth from poor/challenging socio-economic backgrounds were unable to connect to online classes due to their inability to afford the necessary devices, data and home internet packages.

Activities undertaken by the Kingston YMCA included:

- focus group sessions with guidance counsellors from the Jamaica Theological Seminary and the Northern Caribbean University on Anger Management, Character Building and Self-Awareness
- face-to-face classes for students preparing for the Grade Nine Achievement Test (GNAT). A total of 35 students from the Youth Development Programme sat the GNAT and gained placements at secondary level schools
- a one-week orientation for new trainees, conducted by personnel from the Ministry of Education, Youth and Information on the ‘Rights of Parent and Students’
- motivational speeches to students and parents as well as the delivery of care packages by the Council of Voluntary Social Services (CVSS) and the donation of back-to-school items by Restaurants of Jamaica.

Jamaica-4H Club

The Club, which operates under the auspices of the Ministry of Industry, Commerce, Agriculture and Fisheries, continued to provide training to members aged 5–35 years in the areas of agriculture, agro-processing, leadership, social skills, environmental awareness and healthy lifestyle. To date, the Club has 91 218 registered members in over 1 100 clubs. By sex, registered club members were 39 259 males, 47 960 females, and 3 999 members who did not state. A total of 6 631 female members were between the ages 15 and 24 years compared with 5 543 males.

During the year, the Club undertook the following activities:

- *School Garden* – the aim of this project is to have at least one garden in each public school. The review period saw 563 school gardens being registered. When disaggregated by region, there were 162 in Western Jamaica, 161 in Central Jamaica and 240 in Eastern Jamaica.
- *Rural Youth Entrepreneurship and Economic Programme (RYEEP)* – Under this programme, 89

22. The Kingston YMCA’s Youth Development Programme develops the mind, body and spirit of young men through its programmes by providing each student with: Literacy and Numeracy so as to successfully prepare them for the GNAT; training in technical skills to yield gainful employment; exposure to cultural and social activities that support their development in safety issues, healthy life styles and to be civic minded in their communities; coaching and counselling to manage and overcome their individual and unique psychosocial challenges in a supportive, nurturing environment to enlighten students’ awareness in all aspects of Reproductive Health/Family Life.

youth entrepreneurs (46 males) successfully completed training and were provided with input support to start their own business. Training was provided under four agriculture areas: crop, poultry, goat rearing and apiculture.

Beneficiaries Based on Business Type as at December 2020

Agriculture Area	Crop	Poultry	Goat rearing	Apiculture	Total
# of Persons	16	36	21	16	89

- *Training of Tractor Drivers* – A total of 19 persons were trained, with male (16) trainees being the main recipients in the operation and maintenance of agricultural tractors and back hoe operation, which also included front end loading.
- *National Youth in Agriculture Symposium* – The National Youth in Agriculture Symposium was held in February with a total of 3 452 youth from various secondary and tertiary institutions. The event focused on promoting and educating young people about agriculture, agri-technology, climate smart agriculture and food diversification.

PERSONS WITH DISABILITIES

Social development for persons with disabilities proceeded over the year through various initiatives, including policy and legislation, social service delivery, economic and social inclusion, and efforts to advance welfare. Through the **Jamaica Council for Persons with Disabilities** (JCPD) and partners within the government and non-government sectors, the year saw several achievements, despite the impact of the pandemic. Work was accomplished through the finalization of two Codes of Practice to support the implementation and monitoring of the Disabilities Act, namely, Employment, and Education and Training.

Within the JCPD registry for persons with disabilities, new registrants during the year almost tripled the previous year's total, to number 1 495 (920 males) compared with 564 persons in 2019. In relation to the responses surrounding the COVID-19 support, services conditional upon registration were extended to unregistered persons with disabilities. Among these services were the; provision of food and care packages; and distribution of tablets for educational purposes to children with disabilities in rural and urban communities. Other responses prompted by the pandemic and with the aid of public-private partnerships, included:

- COVID-19 Grant – extra payment was made to all 14 907 persons with disabilities who were registered

on PATH (see section on Social Protection).

- GOJ COVID-19 Allocation of Resources for Employees (CARE) programme – \$40.0 million was allocated to persons with disabilities. Since the start of the application process in June, beneficiaries included those who were unemployed, laid off, self-employed, or whose projects were negatively affected.
- Jamaica Public Service (JPS) discount in electricity bills – the JPS reduced the electricity bills, of up to \$5 000.00, of any JCPD-registered client whose bill was in his/her name
- Data and phone cards – the initial offer of free data for a month by the Digicel Foundation was extended to a year and 150 phone cards (\$100–\$300 in value) were donated; the JCPD also supplied 190 clients with phone cards valued at \$100.00 each.

While the JCPD was able to extend additional services across its client network, the entity reported that the pandemic had a negative effect on the delivery of established rehabilitation services, such as the Economic Empowerment Grant, Medical Assistance, and Assistive Aids/Grants. The absence of a virtual application process, as well as a reduction in completed investigations due to physical distancing and quarantine restrictions, resulted in a decline in the number of approved applications for rehabilitation services. Financial assistance fell to \$8.5 million, serving 294 clients (162 females) compared with \$11.3 million and 484 clients in the previous year. Much of this financial assistance went towards educational (158 clients; 85 females) and medical expenses (52 clients; 28 females). Additional educational support was provided through the Margaret Moody Scholarship. For the 2020/2021 academic year, the \$1.05 million award was split between new recipients and returning awardees, totalling \$300 000.00 and \$750 000.00, respectively.

There were 20 Economic Empowerment Grant (EEG) approvals for a total disbursement value of \$2.0 million, and 14 Assistive Aid Grants were approved at a total value of \$2.7 million. In addition, a subvention—capped at \$30 000.00 per client—allowed for the provision of assistive aids to another 25 clients (13 males). Together, the EEG and Assistive Aid Grants saw a decline in approvals by 15 clients and disbursement amount of approximately \$2.1 million.

National Disabilities Awareness Week was celebrated under the theme “Building Back Better: An Inclusive Society for Persons with Disabilities post-COVID-19”. Most activities were conducted virtually and/or with limited face-to-face contact. These included: a national church service with live outdoor broadcast; interviews and discussions via local media geared towards raising awareness on the Disabilities Act, 2014; a week-long five-minute radio feature on the Act; and sensitization sessions in the parishes of St James, St Ann and St Elizabeth,

highlighting the relevance of the Act and work of the JCPD.

The **Early Stimulation Programme (ESP)** of the MLSS is an early intervention programme for young children (up to age six) with developmental disabilities such as cerebral palsy, autism, Down syndrome, and sensory impairment, among others. The ESP also empowers and provides support to the parents and caregivers of children with disabilities through ongoing workshops, training, counselling sessions, and parent support groups. In its 45-year history, the programme, which operates on a referral basis, has treated over 20 000 children from across the island. Over the course of the year, the ESP received 648 referrals, a decrease of 22.8 per cent compared with 2019. Of the total number of referrals, 70.0 per cent was enrolled, numbering 451 (283 boys). Referral and enrolment data were indicative of programme accessibility, as the highest numbers were from parishes within proximity to ESP centres, which are located in Kingston & St Andrew (KSA), St James and Portland. The highest number of referrals was from children within KSA at 300, of which 221 (73.7 per cent; 132 boys) were enrolled. KSA was followed by: St Catherine (65 referred; 43 enrolled); St James (60 referred; 38 enrolled); and Portland (50 referred; 39 enrolled). Planned expansion of specialized services will be done with the aid of a mobile unit. The gender imbalance could be seen at the parish level, as the enrolment of boys per parish was proportionately greater than girls, ranging from 55.8 per cent (St Catherine) to 83.3 per cent (St Elizabeth). In addition to in-centre services, approximately 1 525 intervention sessions were conducted through the ESP's Community-based Rehabilitation Programme. For most of the year, these interventions had to be delivered using a blended approach of in-person and virtual platforms due to the COVID-19 pandemic.

The **Jamaican Association on Intellectual Disabilities (JAID)**, its students and school leavers managed to realize important gains over the period. As part of its transition to virtual learning, JAID provided additional support to parents of students to encourage participation in the virtual educational process. For the year, 105 students graduated from the network of JAID schools—an 11.5 per cent increase relative to the previous year. However, transition preparation was severely reduced after March, as students were unable to participate in the usual work experience exercises that are arranged with partnering businesses. Five graduates gained employment, while 17 were enrolled in post-secondary skills training, 10 were placed in JAID's Uniform and Production Centre,²³ and 28 were allowed to remain for an additional year for engagement in work experience and work readiness training.

Students with high support needs were not exposed to external work experience, but, were engaged on the school compound, due to the level of supervision required to enable work engagement. In addition to the Uniform and Production Centre, the Chupse Employment Support Programme is another such on-site initiative that provides meaningful work for its clients; nine adults (5 females) participated in the programme. However, the programme was suspended in March, due to COVID-19 restrictions, as was the Social Recreational Programme that involved 22 adults earlier in the year. The Art and Craft programme had nine adults (5 males) participating.

As part of efforts to expand services, an agreement for the execution of the Innovative Approaches to the Development of Children with Intellectual Disability project was signed in February. The two-year project has targeted 60 children and their parents in direct intervention research and a feasibility study. The research component is designed to examine therapeutic best practice approaches while the feasibility study seeks to determine scalability of the intervention.

The **Abilities Foundation** recorded an enrolment for January to December of 95 persons (49 females) in the following courses: Housekeeping (19 students; 16 females); Furniture-making (12 students; 11 males); Data Operations Levels 1 and 2 (38 students; 24 males); Design and Décor/Soft Furnishing (15 students; 8 males); and Cosmetology – Nail Technology and Makeup Artistry (11 students; all females). The courses were delivered in partnership with the HEART/NSTA Trust.

Since the implementation of measures to control the spread of COVID-19 during the first quarter, facilitation of vocational skills training had to be converted to an online method of instruction. This initially proved challenging due to the lack of computers or other appropriate electronic devices. However, by the second quarter, 45 tablets were donated by private sector partners. Support in the use of educational online platforms was provided by the Jamaica Teaching Council to 15 instructors, 10 administrative staff and 50 students. Students were also allowed an additional six months to complete their courses of training and a virtual graduation ceremony was held in December.

The “We R Different” project—aimed at empowering women in non-traditional roles and to alter negative perceptions of themselves as women with disabilities—came to a close in July. The programme saw the participation of 19 women who were placed in paid apprenticeships for six weeks at collaborating enterprises. Other apprenticeship opportunities were created for three deaf beneficiaries, who were engaged in rehabilitation

23. AID's Uniform and Production Centre is a new programme that was introduced in June, engaging trainees in the production of uniforms and other household items. Funding support was provided by CHASE Fund and the Digicel Foundation.

of the Foundation's farm. The placement of graduates remained a challenge and was further affected by the pandemic, which led to the postponement of job placement services usually provided through the support of the Youth Services Division of HEART/NSTA Trust. As with the JCPD, the pandemic created opportunities that helped to raise awareness of the work of the Abilities Foundation, resulting in increased demand for services in the 2021/2022 academic year.

SENIOR CITIZENS (60 YEARS AND OVER)

According to the latest population estimates from STATIN, the senior citizens population was estimated at 379 355 (52.3 per cent female) in 2019. This constituted 13.9 per cent of the total population. Trend analysis continues to show the elderly as the fastest growing segment of the population, with the 2019 end-of-year estimates revealing a growth of 3.5 per cent compared with 3.2 per cent in 2018 (see chapter on Population).

The National Council for Senior Citizens (NCSC) managed the programme of services and activities geared to the social development and welfare of senior citizens, in the face of the public health pandemic that began to have serious impacts on the age cohort. The public consultation phase for the Green Paper on the National Policy for Senior Citizens continued during the year. The NCSC also continued to spearhead programmes for the social interaction and economic inclusion of seniors islandwide.

The number of senior citizens clubs increased to 374 from 369 in the previous year. However, club membership and the volunteer corps experienced a decrease to 16 049 (13 414 females) and 1 665 (1 381 females) compared with 16 166 and 1 709, respectively. While St Catherine continued to record the highest number of active clubs (69) and registered members (3 126), Clarendon had the highest number of volunteers at 377 (317 females); St Catherine ranked third in number of volunteers with 267 (235 females). Registered shut-ins increased by 49.0 per cent for a total of 6 788 (4 924 females) and registered centenarians increased by 14.7 per cent to number 226 (185 females). The disruption to the Council's operations resulted in the cancellation of most activities, including those of senior citizens clubs and the 32 Day Activity centres. A total of 161 projects became inactive due to the pandemic, while 49 remained active for the year (30 backyard gardening; 2 beekeeping; 2 sewing; 2 chicken rearing; 13 caring projects providing meals and toiletries). Where possible, calendar events and other initiatives were hosted using online platforms, which created the disadvantage of limiting the number of participants. Programmes and activities for the year focused on education and skills training, health, and nutrition support, with some opportunities for

intergenerational transfer of knowledge.

Educational programmes organized by the Council not only provided seniors with means of mental stimulation and recreation, but also knowledge and skills in areas, to help in meeting the demands of daily life. These included:

- 22 financial/digital literacy sessions on the use of ATMs, kiosks and online banking platforms; 506 seniors (455 females) from nine parishes participated
- four seminars on cybersecurity and three webinars on social services and utility fee waivers for senior citizens; 1 209 (893 females) participated
- two legal aid seminars with 50 participants (44 females) and 97 small group discussions on relevant subjects (e.g. social security benefits; emergency support) with 2 010 participants (959 males)
- six retirement planning seminars with 185 participants (126 females)
- 13 skills-training workshops focusing on culinary and pastry arts, garment construction, beekeeping, and making of face masks and shopping bags; 201 seniors (74 males) participated
- two public-speaking workshops and a final competition; 74 seniors (69 females) participated
- the annual National Senior Spelling Bee Competition
- two senior domino competitions; 304 seniors (124 males) from all parishes participated.

Two farming projects were designed to specifically address food security among seniors during the pandemic, while fostering intergenerational transfer of knowledge and skills. The Get Elders Trained and Youth Engaging Seniors (GET/YES) projects targeted senior citizens who were at home during the pandemic and provided training, via various social media platforms, on growing a variety of fruits and vegetables. The projects saw 60 seniors and five children participating together in backyard and container gardening.

In catering to the health needs of the elderly, four health webinars and 21 health workshops were held in collaboration with the Ministry of Health and Wellness (MOHW), STRiDE Dementia Project, the Diabetes Association of Jamaica, and the National Health Fund. A total of 2 253 seniors (1 280 females) participated. Additionally, one parish health fair was held in St Ann, with 109 seniors (84 females) benefiting from general health services and information. The Council's nurse aides, in collaboration with the MOHW and the Diabetes Association of Jamaica, conducted 1 671 home visits, giving health care to 1 021 older persons with chronic illnesses. Services included general medical care, as well as blood pressure, blood sugar and ECG tests; rollators were donated to 34 seniors (15 males). The Council investigated 28 cases (10 males) of elder abuse, in conjunction with the JCF, Poor

Relief Department and the Ministry of Justice. Referrals and assistance by the NCSC to access health and social services increased by 64.4 per cent, with a total of 6 601 from 4 016 in the previous year (Table 25.6). Referrals included: 415 to the National Health Fund (NHF); 301 to the Jamaica Drugs for the Elderly Programme (JADEP); 447 to the National Insurance Scheme (NIS); and 1 017 to MOHW hospitals and departments.

TABLE 25.6
NATIONAL COUNCIL FOR SENIOR CITIZENS
REFERRALS, 2020

PROGRAMME	NO. OF REFERRALS MADE
NIS	447
JADEP	301
NHF	415
Public Assistance	721
PATH	603
Government of Jamaica Health (GOJ) card	192
Ministry of Health and Wellness Health Departments	1 017
Registrar General's Department	112
Other	2 793
TOTAL	6 601

Other = Food for the Poor, Poor Relief, CPFSA, RADA, SDC, RONA Helpline, Municipal Corporations, et al.

Source: National Council for Senior Citizens

The feeding programme was affected by the pandemic, as the delivery of cooked meals was suspended for four months (March–June), in compliance with infection prevention guidelines. The programme served a more diverse group of beneficiaries than in previous years, which included senior citizens who: lost jobs; were occasional workers; depended on remittances; were NIS pensioners; were indigent and/or shut in. A total of 34 870 meals were provided for the year, and where the provision of cooked meals was not possible, food packages were delivered. A total of 5 260 food packages were delivered to 3 361 elderly, including 83 shut-ins.

The COVID-19-related measures imposed on the elderly population during the year were sensitive to the increased risk of severe illness²⁴ among this age cohort, as older adults (particularly those aged 85 and older) are at highest

risk.²⁵ These included stay-at-home orders, restricted visits to nursing homes, and designated shopping hours in quarantined communities. Despite these restrictions, the elderly constituted the largest proportion of deaths due to COVID-19 (see chapter on Health). The measures further compounded the impact of the pandemic on the elderly and highlighted specific long-standing deficits that impeded service delivery, these included unbanked elderly; issues with waiver of Life Certificates; gaps in financial literacy; and inadequate documentation.

The National Social Protection Committee (NSPC)²⁶ leveraged interagency collaboration and public-private partnerships to identify vulnerable seniors in need of social services and emergency relief. Key partnerships included the Ministry of Local Government and Rural Development (MLGRD), Office of Disaster Preparedness and Emergency Management (ODPEM), Emergency Operations Centre (EOC), and the Poor Relief Department, as well as faith-based and community organizations. The RONA Helpline Senior Care Response was one important support service that came out of collaborative efforts with other government entities such as the MLGRD and the Social Development Commission. The helpline was established for senior citizens aged 70 years and older with urgent needs such as medical care, food, and sanitation supplies (see section on Local Development).

The networking opportunities created by the NSPC allowed for the sharing of information and identification of key entities and personnel for the provision of needed services. In addition, the Council extended its reach beyond the membership of senior citizens clubs and coordinated with other senior citizens special interest groups in the execution of programmes to keep seniors active. These interest groups included the Caribbean Community of Retired Persons (CCRP), the Jamaica Government Pensioners Association, Mona Ageing and Wellness Centre, STRiDE Dementia Project/Alzheimer's Jamaica, and the Jamaica Association for the Resettlement of Returning Residents.

GENDER

The implementation of measures to strengthen gender-based planning and policy formulation, and eliminating discriminatory practices that limit gender equality, remained the commitment of the government over the year. Measures to address gender equality

24. Severe illness may involve hospitalization, intensive care or a ventilator, or death.

25. "COVID-19 And Your Health", *Centers for Disease Control and Prevention*, 2021, <https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/older-adults.html>.

26. The National Social Protection Committee (NSPC) was convened in 2014 as an overarching institutional framework to provide policy and general oversight to the implementation, monitoring and evaluation of the Jamaica Social Protection Strategy.

and equity, the empowerment of women and girls, and gender-based violence were addressed through work on legislation, research studies and collaboration on various projects and programmes. The Bureau of Gender Affairs (BGA), a division of the Ministry of Culture, Gender, Entertainment and Sport (MCGES)—which is charged with the implementation and monitoring of national and global commitments towards gender mainstreaming—made significant contributions to the gender agenda. The BGA through its programme of work continued to promote various measures and interventions to advance the consideration of gender perspectives in policy and programme development. The strategies were aligned to the Bureau’s programme objectives to affirm that gender equality and women’s empowerment are central to the achievement of Goal Two of Vision 2030 Jamaica – National Development Plan, the National Policy for Gender Equality, as well as the goals of the numerous national, regional and international agreements to which the country is signatory.

Legislation, Policy and Programmes

A Joint Select Committee of Parliament was established in 2019 to debate and consider recommendations from oral and written submissions on the Sexual Harassment (Prevention) Bill, (2019). During the year, the Committee received 29 submissions from public and private organizations. It is expected that the passage of the Bill will create the legal framework to regulate workplaces by insisting that employers create an environment that is free from sexual harassment, provide comprehensive sexual harassment policies to guide their organizations and take immediate and appropriate action to deal with the allegations of sexual harassment when they arise. A Memorandum of Understanding was signed between the MCGES and the University of the West Indies Open Campus, to increase the reach of the public education campaign around the pending sexual harassment legislation and to conduct research around the issue of sexual harassment in the workplace. In an effort to strengthen the understanding, detection and reporting of sexual harassment, abuse and exploitation in the workplace, 15 virtual public education, sensitization and awareness raising sessions were held with public and private sector organizations. A total of 462 (352 female) participants were engaged.

The revision of the National Policy for Gender Equality (2012) commenced during the year, with the engagement of stakeholders through consultations, key informant interviews, focus group discussions and online surveys. The review is being done within the context of time, relevance and implementation gaps, and is being supported by the Jamaica Social Investment Fund and the Caribbean Development Fund. The review process, due to have been

completed during the year, was delayed in large part by the COVID-19 pandemic.

Work to reduce gender-based violence remained a critical area of focus for the government. In keeping with the National Strategic Action Plan to Eliminate Gender-Based Violence (NSAP-GBV), the first national shelter for victims of GBV, which was purchased in 2018, was opened. Two additional properties were purchased in the western and eastern regions and are currently being renovated and retrofitted for full operationalization. Public relations activities under the *No Excuse for Abuse* campaign increased. This was in an effort to bring the public’s attention to the helplines established to report gender-based and intimate partner violence, and the support services that are available.

Support to the implementation of activities to address GBV was also provided through the Spotlight Initiative (SI). The SI is a global, multi-year partnership between the European Union and the United Nations to eliminate all forms of violence against women and girls by 2030. Support was provided to assist with the operationalization of the national shelters and to provide technical and financial support for the 24/7 hotline for victims of GBV. This collaboration aims to advance women’s empowerment, by ensuring that women and girls experiencing family violence have access to quality essential services, especially during the COVID-19 pandemic.

The Community Outreach through Partnership for Empowerment Initiative (COPE) serves to increase the financial support provided to non-governmental organizations (NGOs) and community groups. The initiative aims to raise awareness and promote good practices in response to the rising levels of GBV. It also promotes meaningful engagement with men and boys through a series of interventions to achieve behavioural change. Phase two of the project was implemented in 2020, and nine community groups received support.

In response to the impact of the COVID-19 pandemic, the BGA through its community liaison department provided care packages consisting of food items, toiletries, vitamin supplements and cleaning supplies to 245 beneficiaries (193 female) to offset the immediate financial burdens attributed to the pandemic. The beneficiaries were from the parishes of Kingston & St Andrew, St Catherine, Portland, St Mary, Clarendon and St Elizabeth. Additional support from international development partners saw a further 1 350 beneficiaries from all parishes receiving care packages.

Gender Mainstreaming

The BGA continued its efforts to support gender mainstreaming in ministries, departments and agencies (MDAs) through the gender focal point network. Three

Gender Focal Point (GFP) training sessions were held to facilitate the integration of gender considerations in policies, plans, programmes and projects. A total of 43 public sector workers (39 female) were sensitized in the areas of: gender in programme and policy development; gender and climate change; sexual harassment in the workplace; the roles and responsibilities of GFPs; and implementing gender action plans in the workplace. Gender mainstreaming activities were also conducted in the schools through the Gender Ambassador Programmes. Engagement with the Gender Ambassadors was done virtually because of the pandemic. Sensitization sessions were held with students and teachers, covering issues related to bullying in schools, understanding sexual harassment in schools, and youth empowerment and leadership. In an effort to sustain the gains of the programme, quarterly monitoring meetings were held with assigned gender ambassadors from participating schools. The BGA also conducted 21 virtual sensitization sessions with other secondary educational institutions on issues related to sexual harassment and human trafficking. A total 1 322 (843 female) participants were engaged.

The BGA and the Planning Institute of Jamaica lent their expertise in the area of gender mainstreaming on a number of projects being implemented by the government. During the year, the agencies assisted in the development of a protocol to guide gender mainstreaming in disaster risk management and climate change adaptation, as well as assist in the creation of a coordinating mechanism for facilitating a gender responsive approach to climate change adaptation and mitigation in Jamaica.

Gender mainstreaming activities were also implemented at the community level. A total of 20 gender-based training sessions were held with 579 Human Services providers²⁷ (451 female). These sessions addressed solutions and services available for victims of gender-based and intimate partner violence in the communities. In an effort to engage community members on issues related to gender and health, eight virtual information fairs were conducted in the parishes of Kingston and St Andrew, Clarendon and St Ann. A total of 23 community groups benefited from empowerment, capacity building and institutional strengthening sessions, as well as technical support from the BGA. Social work support was also provided to 163 clients (139 females) through first level intervention for victims of gender-based violence (GBV), and those who were negatively affected by the COVID-19 pandemic. This was done through 64 field visits over the period. Other sensitization sessions on domestic violence; human trafficking; intimate partner violence; incest; bullying; and

sexual harassment in the workplace were conducted with faith-based organizations and other community groups.

Political and Economic Empowerment

In order to support women's political and economic empowerment, the government participated in and supported the global community in observing the relevant international days. **International Women's Day** was observed on March 8 with a live discussion event with female leaders in the areas of law and politics, media, business and medicine. **International Day of Rural Women** was commemorated with a policy discussion on gender, rural development and food security, and financial support was provided to families from maroon communities to offset the expenses related to online learning during the COVID-19 pandemic. **World Day for Decent Work** was observed in October with sensitization sessions on issues related to sexual harassment, labour laws, gender-based violence and mental health, with women and men in the care economy. To commemorate **International Day for the Elimination of Violence Against Women (IDEVAW) and the 16 Days of Activism**, the BGA hosted both a public forum and a virtual youth session, reaching approximately 350 individuals (270 female). **International Men's Day** was celebrated on November 19, with a virtual forum focusing on the theme: "A Man's Health is a Man's Wealth: Men and Healthy Lifestyle Practices during the Pandemic." Approximately 250 men participated in the forum.

Capacity-building initiatives were also implemented to support women's economic empowerment. During the year, four financial literacy workshops were conducted with local financial institutions. The workshops were aimed at improving the management of the personal and household finances of women, empowering them to choose and access appropriate financial services and products, as well as developing and managing entrepreneurial activities. The target audience included victims of gender-based violence, household workers, minimum wage earners and farmers.

Initiatives for men

A number of initiatives were implemented to: recognize the work that males have been doing in their communities; build the capacity of males to support gender equality outcomes; and establish networks to support male youth development. During the year, the government recognized 20 men for being exemplary fathers, mentors and leaders. In addition, 20 young fathers were selected to participate in the **Young Fathers Jamaica Initiative**, designed to assist

27. Human Service Worker is the nomenclature used for Poor Relief Officers at the Human Services Division of the Ministry of Local Government and Community Development (formerly Board of Supervision).

youth fathers between the ages of 15 and 29 to improve parenting skills, develop self-efficacy/life skills and improve the interpersonal relationship with their family members and peers. The **#MentorMe2020 - Male Mentorship Programme**, designed to assist boys at the secondary level, was implemented in two high schools; 15 boys from each school were paired with suitable male mentors. One capacity-building session was held with 46 men covering issues related to men and masculinity, gender-based violence and men, and mental health.

Adolescent Mothers

In the area of services to teenage mothers, the Women's Centre of Jamaica Foundation (WCJF) remained committed to meeting the diverse needs of adolescent and young adults by promoting healthy sexual and reproductive health practices. The programme of intervention includes academic instructions in the core CSEC subjects, group and individual counselling, as well as skills training. The Foundation in 2020 served 798 students, 38 of whom were registered in CSEC classes. The reintegration of adolescent mothers into the formal school system or other institutions of learning is an important component of the intervention. A total of 320 adolescent mothers were targeted for reintegration, the WCJF exceeded that target, with 353 mothers being reintegrated into the formal school system. Additionally, 56 adolescent mothers were placed in other institutions of learning during the period. Adolescent mothers were encouraged to choose a contraceptive method to prevent a second pregnancy before completing their secondary education. This activity saw 310 adolescent mothers choosing a method, with the written consent of their parent or guardian. Counselling and mentoring services in the areas of sexual and reproductive health were offered to 104 fathers. A total of 40 males were referred and accepted for inclusion in the Ministry of Justice Child Diversion Programme.

The COVID-19 pandemic and the subsequent government-issued restrictions, significantly affected the implementation and execution of programme activities throughout the year. Instructions to students in the CSEC classes, as well as the continuing education classes, were remotely delivered using various online platforms; in instances where students had limited access to electronic devices and/or the internet, learner kits were delivered to them. The lack of face-to-face instruction resulted in the scaling down of the number of subjects delivered to students in both the CSEC and continuing education classes. The pandemic also curtailed the implementation of other services including: the delivery of on-site sexual and reproductive health services; peer counselling training and peer counselling group sessions with in-school youths; practicum placement for students registered with the

WCJF; public education sessions; and the annual girls' conference.

Notwithstanding the challenges, achievements during the year included:

- continued implementation of the A-STREAM programme, which provided adolescent mothers at the tertiary level, and those who have been reintegrated into formal schools with both psychosocial and financial support. A total of 40 mothers and one young father were given bursaries, while six students at the tertiary level were awarded scholarships.
- award of certificates in levels 1 to 3 in English Language and Mathematics in the City and Guilds examinations to 60 adolescent mothers.
- hosting of the Pamela McNeil Lecture on adolescent pregnancy; the virtual session was attended by over 150 participants.
- delivery of capacity-building, psychosocial and gender-based violence sessions to adolescent mothers and facilitators.

The Foundation conducted a first aid intervention survey to gauge the psychological and emotional impact the pandemic had on its students. A total of 388 clients, aged 13 to 18 years were surveyed. The survey revealed that 70.4 per cent of the clients expressed negative emotions such as fear, anxiety, sadness and uncertainty due to the pandemic. The survey also highlighted that the non-engagement in educational and productive activities during the pandemic may lead to the risk of a second pregnancy.

In an effort to combat the impact of the pandemic on adolescent mothers, the Foundation, with assistance from its partners, was able to provide:

- 415 dignity kits at a cost of \$4.4 million (including food, hygiene and sanitization items)
- 34 adolescent mothers with a \$10 000.00 COVID-19 relief grant
- personal care packages and items for children of adolescent mothers
- sanitization gear and equipment for use by the adolescent mothers
- tablets, laptops and smartphones for the delivery of counselling sessions, online classes and participation in external examinations by the students.

Education and Research

Through its programme of teaching, research/publications, outreach and public service, the Institute for Gender and Development Studies (IGDS), Mona Unit continued to advance gender equity and gender mainstreaming. During the reporting period, 69 students (57 female) were registered in the Bachelor of

Science in Gender and Development degree programme. Approximately 12 new students (nine female) were accepted for the 2020/2021 academic year, while 13 students (12 female) graduated in November 2020. There were 551 students (466 female) registered in 16 gender courses, offered over two semesters; these courses were delivered at the Mona and Western Jamaica campuses. Since its inception, over 159 students have graduated from the BSc programme in Gender & Development studies, and 141 students declared it as their minor. The IGDS Mona Unit continued to mainstream gender through cross-faculty teaching and guest lectures; joint research and publications; and outreach, including presentations at conferences and public education events. These served to increase the awareness of gender issues in education, especially in the development of curriculum and teaching methodologies.

The Unit's **research and publication** programme supported the development of national programmes and policies, which increased awareness of gender inequities and promoted gender mainstreaming in various sectors. The IGDS collaborated with the Faculty of Medical Sciences on a four-year project aimed at identifying effective gender-sensitive ways of improving household food security and nutrition within CARICOM states. Work was also undertaken in the areas of child trafficking, human trafficking and migration. The Unit continued to promote gender equity through its outreach and public service programmes; virtual public lectures; workshops; media interviews on the impact of COVID-19 on physical and emotional health; sexual harassment and other forms of inequality.

LOCAL DEVELOPMENT

The priority areas for the Ministry of Local Government and Rural Development²⁸ (MLGRD) were; social protection; fire safety and protection; waste management and enforcement; community development and empowerment; infrastructure development; and revenue generation and enhancement. Attention was also placed on the legislative agenda to include further revision of the Human Services Bill, 2020; the National Solid Waste (Amendment) Bill, 2020; the National Solid Waste Authority (Disposal of Solid Waste facilities) Regulations; and the proposal for amendments to the Disaster Risk Management Act, 2015. Just under \$8.0 billion was collected from property taxes toward revenue generation and enhancement. The ministry has been one of the integral entities in the GOJ's response to the COVID-19 pandemic through various interventions and support. Some 4 500 youth, engaged in the Youth

Summer Employment Programme (YESP) assisted with the community support programme islandwide. The YESP is undertaken in collaboration with the Local Authorities and the Social Development Commission (SDC), and tasks assigned have included data collection on audits of streetlights, trade licences, billboards and signs. To date, over 16 000 young people have been employed under the programme. The Municipal Social Assistance Programme (MSAP) provides social support to the 228 divisions across Jamaica in the form of education, social housing, funeral grants, indigent housing, and administrative assistance, among others. There were over 120 000 direct and indirect beneficiaries of the MSAP during the year. The **social protection programme**, which aided a number of vulnerable persons, was undertaken by the Board of Supervision (see section on Social Protection section of this chapter for more details).

Several lectures on life and **fire safety** were conducted by the Jamaica Fire Brigade in various communities and 5 500 buildings were inspected to determine compliance with relevant code and standards islandwide. Construction of three new fire stations—the Barnett Street, Yallahs, and Port Maria Fire Stations—continued over the review period, while renovation of the May Pen Fire Station was completed. Over 900 fire hydrants were maintained, while 200 were repaired. Several items were procured for use by fire personnel and included: 30 firefighting pumpers; 355 bunker gears; 200 full face respirators; 120 marine protective gears; 20 hundred-foot rescue rope sets; 15 circular saws; and eight life rafts/rescue boats. In addition, 85 recruits were trained and have joined the Brigade as firefighters.

In the area of **infrastructural development**, two water shops were constructed, one in Tryall, St Elizabeth and the other in Commodore, Portland. The Trelawny and Hanover markets were repaired, while phase 3 construction of the Clarks Town and Hopewell markets continued. Construction also continued for two new Drop-in centres in St Catherine (Linstead) and Kingston (Downtown).

Cleanliness and beautification across communities were critical areas of focus, especially within the context of the COVID-19 pandemic. The **waste management programme** was implemented by the National Solid Waste Management Authority (NSWMA), with over 978 781 tonnes of solid waste collected. A time and motion survey was conducted in the parishes of St Catherine and St Andrew to improve the efficiency of waste collection in the region. The project to replace the old Bailey bridge at the Riverton disposal site was completed satisfactorily. Additionally, a fire suppression system and a gas venting system were installed

28. Post the general elections in September 2020, the Ministry of Local Government and Community Development was renamed the Ministry of Local Government and Rural Development.

at the Haddon disposal site to mitigate environmental hazards such as fires at the site. The capacity of the agency was improved with the acquisition of 20 garbage collection trucks and the donation of a compactor unit from Jamaica Social Investment Fund (JSIF) and a tipper unit through the Rae Town Plastic Minimization Project (see chapter on Sustainable Development for more information). On November 18, a community-based project dubbed 'Drum a Di Gate', was launched. The project is expected to address issues associated with poor garbage containerization. Garbage receptacles (drums) were distributed to participating households on Bethel Street in Greenvale, Manchester. The residents were then briefed on their personal responsibility in relation to waste management and the importance of having a receptacle that is readily accessible to sanitation teams.

A public education campaign was hosted under the theme, 'SOLID – Stomp out Littering and Illegal Dumping' and persons were sensitized on illegal dumping and composting through various channels such as community meetings, social media platforms, school visits and government agency meetings. A Plastic Separation Pilot Project was successfully implemented and led to the collection of over 27 215.5 kg (60 000 lbs) of plastic waste from 16 designated communities in Kingston and St Andrew. The Authority also launched a mobile app on June 5th, to report littering in public spaces and illegal dumping (see chapter on Sustainable Development). The Authority also sensitized 4 706 residents and 5 405 commercial business owners concerning compliance with the provisions of the NSWM Act, 2001 regarding proper containerization of waste on their respective properties. A total of 516 surveillance exercises were conducted to apprehend offenders in breach, and 1 955 litter tickets and 7 987 removal notices were issued to enforce the NSWM Act, 2001.

There was focus on the use of a research-based approach to meet the changing needs of community residents and local economic initiatives through the strengthening of governance structures; creating and updating of profiles, asset maps and priority plans; hosting of Inter-agency meetings; and issuing of community grants. The SDC in its capacity as the community development arm of the GOJ provided support to the government response to COVID-19. This included providing data on quarantined communities (Tivoli, Bull Bay, Corn Piece, Annotto Bay and Enfield); mapping community bars and shops; auditing outdoor entertainment facilities; and developing protocols for the reopening of bars, restaurants, zoos, the rafting industry, rivers/beaches, gyms, parks, cinemas, playhouses and theme parks/amusement parks. Four surveys were

done across the parishes to determine the readiness of operators and then compliance with implemented protocols. Monetary relief through grants was provided to local economic initiatives and business fairs were held to assist other affected groups such as farmers, vendors and distributors. Additionally, a RONA Helpline was established in collaboration with the MLGRD.²⁹ This call-in helpline is for citizens 70 years and older who lack basic support at home. Persons called to access medical assistance, including transportation to health-care facilities for urgent care, non-financial assistance to obtain medication, groceries and other critical needs. Some 217 calls were received between March and June, after which there was a significant reduction in the calls to the helpline.

Under the **Local Economic Development Support Programme**, 404 Local Economic Initiatives (LEIs) benefited from business support services. This resulted in the employment of 1 659 persons (189 youth): 840 full-time, 542 part-time, and 277 seasonally. A total of 52 capacity-building sessions were held with over 398 community members and grassroots entrepreneurs, and 96 Civil Society Organizations/LEIs. Training was delivered in business idea development, management principles and entrepreneurship, costing & pricing, business registration, social media marketing, product development, financial planning, basic bookkeeping, packaging and labelling. Additional work undertaken with selected LEIs resulted in the preparation of 52 business models and 21 business plans. Six project proposals received funding, totalling \$3.8 million. The grants received were obtained from the Digicel Foundation, Tourism Enhancement Fund and the Tourism Product Development Company Limited. A total of 62 business fairs were held, 20 of which took place during the period January–March; however, in response to the effects of the COVID-19 pandemic on communities' economic base, the model was changed. This change saw the business fair concept being merged with a farmers' market component and 42 SDC Community Market & Business Fairs were held in 32 communities islandwide. There was participation from 326 grassroots community enterprises, 440 farmers, 111 vendors and 25 distributors, and earnings from these fairs was just under \$66.0 million.

Efforts to **strengthen the participatory governance framework** were affected by the pandemic. There was a 12.9 per cent decline in the number of active community-based organizations, from 726 in 2019 to 632. The number of active community development committees (CDCs) also declined, from 651 in 2019 to 559. There were 63 active development area committees (DACs) and 10 active parish development committees (PDCs), while one was being reactivated. During the period, emphasis was placed on

29. Then, the Ministry of Local Government and Community Development.

capacity building and to this end, 45 groups benefited from several training and intervention modules, while another 287 groups were engaged in strategic planning and support for their annual general meetings.

Having been given the mandate as Registrar of community groups and civil society organizations, as well as the authority to accord legal status of groups as ascribed in the Local Governance Act (2016), the SDC established its registry in 2019. During the year, the following were developed: the process for registration along with supporting documentation; standard operating procedures for the registry; public education materials; a payment system; and internal control mechanisms. Work also commenced on the development of a database for the registry. There were sensitization sessions with internal and external stakeholders on the role and function of the registry.

In the area of **community research and development planning**, 10 community profiles were completed, bringing the total number of communities with profiles (full community profiles and summary profiles) available to 697 of the 775 communities islandwide (89.9 per cent coverage). Geographic Information Systems (GIS) software was used to create 67 asset maps. These maps have been validated with the communities to assist in addressing social, physical and environmental issues affecting communities. There are now 719 maps available; 92.8 per cent of the 775 communities islandwide. Additionally, 17 Community Priority Plans (CPPs) were developed, bringing to 567 the number of CPPs available (73.2 per cent coverage). There were 136 projects/programmes that emerged from the community priority planning process that were at varying phases in the project cycle—72 at the implementation phase; 46 submitted to funders and still at the appraisal phase; 9 at the approval phase, while another 9 were completed. The nine project proposals at the approval phase are valued at approximately \$73.6 million; while the other nine projects were completed at a cost of just under \$43.2 million. The completed projects sought to address community issues related to physical infrastructure, economic enablement and cultural/heritage.

There were 45 **inter-agency network** (IAN) meetings. Towards the latter part of the year the IAN shifted focus, as agencies implemented activities to meet the changing needs of residents living and operating in a pandemic. As a result, there were 61 joined-up interventions benefiting 585 citizens.

A total of 206 teams registered for the fourteenth staging of the cricket competition under the **Sports for Community Development** Programme which had to be

postponed. As it relates to parish-led sporting activities, 19 activities were held in the period January–March.

Two calls were issued under four **grant facilities** to support local economic initiatives, governance structures and address priority planning issues within communities for the financial year 2019/2020. The Parish Development Committee Grant was introduced to provide funding support for the PDCs to facilitate growth and greater involvement in the parishes. Grant applications approved totalled 261 and were broken down as follows:

- 24 Local Economic Development Grants – \$2.3 million
- 14 Community Priority Plan Grants – \$1.7 million
- 213 GOJ Administrative Grants – \$8.0 million
- 10 Parish Development Committee Grants – \$4.5 million.

During the review period, 12 meetings were held with citizens' groups in schemes under the remit of the Ministry of Housing, Urban Renewal, Environment and Climate Change. The meetings were facilitated by the community development arm of the Social Services Unit. Topics included: arrears management and responsibilities; establishment and maintenance of committees and sub-committees; enforcement of the Ministry of Health and Wellness protocols and guidelines for COVID-19; use and benefit of certificates of title; citizens safety and security; becoming contributors to the National Insurance Scheme (NIS) and the National Housing Trust (NHT); and access to funding for small business ventures and community development projects. As part of conflict prevention/resolution efforts, visits were made to six housing schemes³⁰ to deal with issues related to the construction and operation of illegal businesses in areas designated as green spaces and common areas, and the operation of entertainment places and shops in residential communities.

A total of 385 boundary pegs were identified across three brownfield communities and 284 **occupancy audits** were conducted in another three communities. Only eight meetings of the management committees were held in the communities due to the impact of COVID-19. Efforts to **divest brownfield and greenfield sites** also continued for schemes that had been divested from previous years, however sales remain incomplete. A total of 20 rental units were converted to units for sale, and 76 upgraded and serviced sites were divested while approximately \$43.4 million in revenue was collected.

The poverty alleviation intervention for at-risk individuals and families continued under the **Social Housing Programme, Social Housing Rehabilitation**

30. Farquhars Beach (Clarendon), Windsor Heights (St Catherine), Vanzieland (Trelawny), Galleon Beach and Lower Works (St Elizabeth) and Hart Hill (Portland).

Programme and Special Assistance Scheme. The Social Housing Programme (SHP) is geared towards assisting persons who are deemed needy and indigent, and other persons whether employed or unemployed, who are unable to build, rebuild or repair their homes. These persons are without adequate shelter or live in conditions unsuitable for human habitation. The programme included the provision of complete units to individuals at or below the poverty line who have no access to formal funding. A total of 352 cases were investigated and approved under the SHP and just over \$48.9 million was approved for repairs to be undertaken by the beneficiaries.

Assistance was provided to a number of underserved communities, as the **Jamaica Social Investment Fund (JSIF)** implemented projects aimed at crime and violence prevention, disaster risk reduction and social protection in support of the Vision 2030 Jamaica – National Development Plan. Sub-projects were implemented under seven loan and grant portfolios: the Basic Needs Trust Fund 9th Programme (BNTF 9); the Disaster Vulnerability Reduction Project (DVRP); the Integrated Community Development Project (ICDP); the Integrated Community Development Project II (ICDP II); the Poverty Reduction Programme IV (PRP IV); the School Sanitation Project (SSP); and the Rural Economic Development Initiative II (REDI II). Over \$2.8 billion was disbursed for community

development activities, \$200.0 million less than in the previous year.

During the period, 28 sub-projects were approved for funding, 13 more than in 2019 (Table 25.7). Sub-projects included: 15 on basic and economic infrastructure to benefit 52 899 persons; 10 on multiple types of interventions³¹ to more than 115 700 persons; and three on technical assistance to government agencies (includes setting up a therapeutic centre for the CPFSA) to benefit over 6 000 persons. The number of sub-projects completed was 24, and this was 11 fewer than in 2019. Of the 24 sub-projects completed, 19 were infrastructure related and included rehabilitation of primary schools, urban and rural roads, replacement of zinc fences and the upgrading of community integrated infrastructure (road/water/sewage) in targeted areas, benefiting over 65 000 persons.³² The remaining five completed sub-projects benefited over 2 700 persons and included: technical support for the Jamaica Crime Observatory (JCO) located in the Ministry of National Security (MNS); summer camps for youth and children from volatile communities; establishment of solid waste management programmes in 18 communities; strengthening of neighbourhood watch groups (NWG), police youth clubs (PYC) and the Jamaica Constabulary Force (JCF) Community Safety and Security Branch (CSSB); and strengthening of community tourism

TABLE 25.7
JAMAICA SOCIAL INVESTMENT FUND STATUS OF PROJECTS, 2020 (VALUE AND COST IN \$MILLION)

Sector	Number Approved Projects	Value of Projects Approved	Total Project Cost	Estimated Beneficiaries	Number Completed Projects	Value of Completed Projects	Total Project Cost	Number of Beneficiaries
Social Infrastructure	17	437.4	461.2	47 843	17	1 724.5	1 764.1	138 669
Economic Infrastructure	0	0.0	0.0	0	3	193.9	205.9	6 790
Social Services	9	66.4	66.6	13 900	3	82.5	86.1	2 760
Organizational Strengthening	0	0.0	0.0	0	0	0.0	0.0	0
Special Projects	0	0.0	0	0	1	44.0	48.0	25
Equipping	2	111.6	111.6	50 652	0	0.0	0.0	0
TOTAL	28	1 265.2	1 311.6	175 537	24	2 044.9	2 104.2	148 244

Note:

"Value" refers to JSIF cost

Total project cost includes the community contribution

Discrepancies are due to rounding

Source: Jamaica Social Investment Fund

31. Interventions included: provision of birth certificates, summer camps for youth, land registration/regularization for one informal community, assistance to community micro enterprises, personal protective equipment for several health centres, solid waste management systems for a number of volatile areas and capacity building for community-based organizations, agriculture and tourism enterprises.

32. Some persons benefited from several interventions.

enterprises and agricultural groups.

A breakdown of the completed projects is outlined below.

- \$184.0 million was disbursed under the PRP IV and three projects were implemented. These are the Bog Walk Health Centre Expansion and Dental Unit Construction (St Catherine) and the rehabilitation of the Pineapple Lane Road (St Catherine) and the Bia & Henley Road with drain construction (St Andrew).
- \$260.0 million was disbursed under the BNTF 9 for capacity building and training of persons in the tourism and agriculture sector (multi-parish); construction works at the Marlie Mount Primary School (St Catherine) and Jacks River Primary School (St Mary); and rehabilitation of the Epworth Rural Feeder Road (St Ann).
- \$1.1 billion was disbursed under the ICDP for rehabilitation of six primary schools namely, Anchovy Primary and Roehampton Primary (St James); Denham Town Primary and Chetolah Park Primary (Kingston); and Rousseau Primary and St Andrew Primary (St Andrew). There were five integrated infrastructure projects providing basic community infrastructure such as water, roads, sewage and drainage in Denham Town (Kingston) and Greenwich Town, Maxfield Park, Rose Town and Majesty Gardens (St Andrew). There was also a zinc fence removal exercise in Canaan Heights (Clarendon). Support was provided to the JCO in the MNS and the JCF's CSSB, NWGs and PYCs.
- \$229.0 million was disbursed under the ICDP II for the rehabilitation of the Treadlight Primary School (Clarendon), implementation of the ICDP II Summer Camp Programme (multi-parish) and commencement of activities related to a number of social interventions and infrastructure works.

The **Community Renewal Programme** continued to provide a platform for coordinating and monitoring initiatives that facilitate: social transformation, economic development, strengthened governance, improved safety and access to justice in targeted communities. This is achieved through: strengthening of partnerships amongst IDPs, MDAs, NGOs and private sector entities; harmonization and coordination of efforts among CRP implementing partners; resource mobilization; support for the design and/or implementation of catalytic interventions and policies that advance the community transformation agenda; establishment and operationalization of the CRP monitoring & evaluation (M&E) system; and increased analysis and research capabilities amongst CRP implementing partners towards evidence-based community development and transformation.

During the review period the following were undertaken:

- review of the findings and production of the final report of the baseline study of 17 communities conducted between March and June 2019. The data collected will inform programming decisions and provide benchmarks against which intended outcomes and the impact of various interventions are measured in the beneficiary communities.
- finalization of the Action Planning Framework for Salt Spring in St James.
- implementation of the 360 Recycle Climate Smart Agriculture Project, which commenced in September. The objective of the project is to provide growpots made from recyclables to 80 households, to improve food security and inspire sustainable micro Agro-Enterprise, and to combat the effects of COVID-19 on food security. To date, 80 persons from Salt Spring, St James have been trained under the project.
- implementation of the IAN Youth Programme (commenced in February) – the programme aims to increase youth participation in the community development process and increase the CDCs knowledge in the areas of project management and proposal writing. It targets 30 youth from Trench Town and Tivoli Gardens for training in the areas of community leadership, business administration, proposal writing, business model canvassing and project management.
- the Rose Town Block Making Project (commenced in March) – the project targets unattached and at-risk youth from the Rose Town Community. It provides the opportunity for the targeted individuals to learn a skill and improve their personal and professional development, thus making them employable. To date 17 persons have benefited from training.
- the Peace Building Project for Violence Producers in Jamaica (April to November) – the project targeted gangs and at-risk youth in the Majesty Gardens Community as a means of reducing violence in the community and was carried out by the Peace Management Initiative.
- completion of the Community Renewal Index (CRI) – the CRI was completed in November, with its primary purpose being to determine how the renewed vulnerable and volatile communities were vis-à-vis other similar communities and to identify issues in the community relating to specified thematic areas that may need to be addressed.

SOCIAL PROTECTION

As a social stabilizing influence, social protection interventions continued throughout the period, and were integral in lessening the negative impacts of the pandemic. The Jamaica Social Protection Strategy 2014 remained relevant to the implementation of current programmes and services for effective social protection coverage, and reinforced responsive interventions to meet the emerging crisis. Persons across all age groups were at potential risk for negative impacts on their income security, with significant job losses and underemployment in several industries and sectors (see chapter on the Labour Market). The resources of government were disbursed in the form of cash and kind, as well as provisions to accommodate ease of access to benefits and services, through several entities. Efforts to expand coverage by social protection schemes and provisions, as well as to build capacity for programme delivery were supported by various international development partners. Local partnerships with non-government bodies, civic organizations and the private sector proved valuable in resource mobilization, identification of vulnerable persons, and distribution of benefits.

The National Social Protection Committee (NSPC), convened in 2014 as the institutional framework supporting the Jamaica Social Protection Strategy, continued quarterly meetings over the period. With a focus on policy level input, research and dialogue, the NSPC completed a mapping of social housing interventions islandwide, through an interactive web-based map; examined gaps in access to programmes and provisions, and explored the multi-stakeholder responses to the ongoing pandemic. Other areas of deliberation included social security for migrant workers, financial and economic inclusion of vulnerable populations, training and employment opportunities for persons with disabilities, inter alia. The annual NSPC Policy Forum was held virtually in November, with a focus on ‘Bouncing Forward... Innovative Social Protection Responses’. Presentations focused on educational access, psychosocial support under the National Poverty Reduction Programme, delivery of social protection through the digital economy, and unemployment insurance.

Government priorities in social protection continued to receive support from international development partners. The Integrated Support to Jamaica’s Social Protection Strategy Project, funded by the Inter-American Development Bank and implemented within the Ministry of Labour and Social Security (MLSS) was extended to October 2021 to facilitate the completion of infrastructural

developments within the MLSS. These developments include the renovation of the customer service station at the MLSS Heroes Circle Office, as well as the installation of Voice Over Internet Protocol Technology within the ministry.

The government responded in March to the economic impacts of the pandemic by instituting the COVID Allocation of Resources to Employees Programme (WE CARE Programme), which sought to provide social protection through welfare transfers and labour market stimuli. The cash transfers were made available in several categories, offering support for income and employment loss, as well as market fallout in several industries and sectors (see chapter on the Labour Market)

Poverty Reduction

The Jamaica Survey of Living Conditions (JSLC) 2018 estimated that 12.6 per cent of the population was living in poverty, with the overall adult equivalent poverty line being \$194 541.29. This compares with 19.3 per cent in the previous year, representing a 6.7 percentage point decline. The largest prevalence of poverty was recorded for Rural Areas (RA) at 15.0 per cent, while Other Urban Centres (OUC) was estimated at 12.0 per cent, and the Greater Kingston Metropolitan Area (GKMA) at 9.2 per cent. The comparative data for the revised 2017 estimates were 20.2 per cent for RA, 19.8 per cent for OUC and 17.7 per cent for GKMA.³³ Food poverty prevalence stood at 3.5 per cent, a decline from 5.4 per cent in 2017. The overall adult equivalent food poverty line was \$127 014.38. OUC was the region with the highest prevalence of the food poor (3.9 per cent), followed by RA with 3.7 per cent and GKMA with 2.9 per cent. Comparative 2017 regional data was 5.6 per cent in RA, 5.5 per cent in GKMA and 4.8 per cent in OUC.

The Poverty Reduction Coordinating Unit (PRCU) of the Planning Institute of Jamaica (PIOJ), continued to give oversight to the implementation, monitoring and evaluation of the National Poverty Reduction Programme (NPRP). The first Medium-term NPRP (2018–2021) commenced in April 2018, following the approval of the National Policy on Poverty and National Poverty Reduction Programme by Cabinet in September 2017. During the year, the coordination of the National Poverty Reduction Programme (NPRP) gathered momentum despite challenges encountered as a result of containment measures in response to the COVID-19 pandemic. The first case of the disease was detected in Jamaica in March. This led to the curtailment of several face-to-face interactions including meetings and business activities, as well as

33. Comparison of poverty data series cannot be effected in this edition, as the sampling design and weighting methodology for the JSLC have been revised for 2017 and 2018 datasets.

international travel. Livelihood for some was consequently interrupted and the need for greater support to the most vulnerable and those affected was underscored. The main coordinating achievements under the NPRP are set out below.

The first NPRP Capacity-building Workshop was convened in February, and saw the engagement of 28 participants from 18 organizations in a two-day Monitoring and Evaluation (M&E) training. The training was conducted with the support of the Community Renewal Programme (CRP) in the PIOJ. The meetings of the National Poverty Reduction Programme Committee (NPRPC), which is the main mechanism for monitoring implementation and building partnership and collaboration among implementing partners, continued to be convened. Towards the latter half of the year, information technology platforms were utilized to facilitate virtual meetings, in lieu of face-to-face meetings, as a result of COVID-19 restrictions and protocols. The three Working Groups of the NPRP were also convened virtually. The development of the Monitoring and Evaluation (M&E) Framework for the NPRP was completed, with inputs from the Technical Review Committee (TRC) established to support its finalization. The building out of an NPRP web page was also advanced as a mechanism for strengthened collaboration and communication under the NPRP.

An Assessment of the National Poverty Reduction Programme was facilitated by the (NPRPC). It involved an examination of the implementation progress of the NPRP against stated timelines and objectives, in an effort to determine the effectiveness of the coordinating approach and mechanisms of the NPRP. The level of stakeholder participation, collaboration, and partnership was also examined, as well as the performance of key indicators in the M&E Framework. The assessment is intended to provide recommendations to inform the implementation of the NPRP over the remainder of the medium-term period, guide the priorities and approaches for the development and implementation of the next medium-term period, and inform poverty reduction prioritization and decision-making.

The impact of COVID-19 on the service delivery of NPRP implementing partners was compiled and shared with stakeholders and policy makers to guide decision-making. The report included the extent to which service delivery was affected, gaps in service provision, emerging beneficiary groups, challenges, and the overall impact on programme targets. The examination of new partnerships and opportunities for collaboration, and the general response of service providers to augment the delivery of services was also explored and documented. The paper

provided a number of recommendations to inform programme delivery and decision-making. A Policy Brief on global and local poverty reduction responses due to the impact of COVID-19 was also completed. The Brief, which was informed by desk-research and which provided policy recommendations, was shared with the NPRP partners and other stakeholders.-

Social Assistance

Social assistance, or welfare benefits and services, is provided through several state programmes and entities. Despite COVID-19, the implementation of social welfare programmes continued with special adherence to protocols to ensure that those in need receive assistance while reducing risk to the virus. The GOJ/IDB Integrated Support to the Jamaica Social Protection Strategy Project continued to be implemented in support of delivery systems and capacity of key entities, as well as the ongoing conduct of a tracer study on welfare households. Initially anticipated to end in November, the government requested a project extension to facilitate project completion, which was subsequently granted for October 2021. UNICEF during the year provided a grant of \$40.0 million in support of additional cash transfers to pregnant and lactating women, and to children with disabilities for assistance with food needs. The disbursement of these transfers was done through the PATH payment modalities, and data is provided in Table 25.8C.

The **Programme of Advancement Through Health and Education** (PATH) continued to be implemented by MLSS, providing cash transfers and other supports. The main objective of PATH is to break the intergenerational cycle of poverty, by investing in the human capital development outcomes of the poor. The Programme provides support in cash grants to the most vulnerable in the population. PATH pays benefits to individuals in qualified families within six benefit groups, namely: the elderly, persons with disabilities, children attending school, children under 6 years old, pregnant/lactating women and the adult poor. Tables 25.8A and 25.8B show that as at December 2020, a total of 331 780 beneficiaries were registered on PATH; during the year, 303 746 persons on average received bi-monthly benefits. As at December, the expenditure outlay for the regular cash transfer benefit payments amounted to \$6 635.4 million, 85.0 per cent of the budget for the financial year 2020/21. However, due to the responses to the pandemic, there was an additional disbursement of benefits to the vulnerable families on PATH. Expenditure totalling \$10 619.1 million was therefore disbursed over the period, inclusive of the regular bi-monthly payments. The additional categories of payment included: School Feeding; We CARE Grants; Back-to-School Grants; and UNICEF

TABLE 25.8A
PATH BENEFICIARIES BY PARISH AND CATEGORY REGISTERED,
DECEMBER 2020

PARISH	Health (0–under 6 yrs)	Education (6–17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston & St Andrew	4 366	28 892	10 760	2 671	24	1 857	2 551	51 121
St Thomas	1 927	8 774	3 656	1 031	26	702	265	16 381
Portland	2 137	8 111	3 632	700	79	423	662	15 744
St Mary	2 375	12 087	5 751	1 238	51	799	457	22 758
St Ann	1 744	10 270	5 948	964	29	882	803	20 640
Trelawny	2 406	9 529	3 701	555	60	483	342	17 076
St James	2 460	11 648	4 221	651	79	656	1 259	20 974
Hanover	2 318	8 447	3 961	793	67	578	412	16 576
Westmoreland	3 327	13 596	5 769	1 082	90	843	315	25 022
St Elizabeth	2 095	12 738	7 297	1 377	92	737	388	24 724
Manchester	1 201	9 472	4 989	700	30	522	579	17 493
Clarendon	3 460	22 010	9 112	1 778	70	1 089	637	38 156
St Catherine	3 704	25 905	10 561	2 013	48	1 383	1 501	45 115
TOTAL	33 520	181 479	79 358	15 553	745	10 954	10 171	331 780

Source: Ministry of Labour and Social Security

TABLE 25.8B
PATH BENEFICIARIES BY PARISH AND CATEGORY PAID,
DECEMBER 2020

PARISH	Health (0–under 6 yrs)	Education (6–17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston & St Andrew	3 963	26 901	8 477	2 688	67	1 606	2 926	46 628
St Thomas	1 823	8 108	3 161	1 051	82	686	265	15 176
Portland	2 195	7 653	3 405	720	172	451	729	15 325
St Mary	2 150	10 545	4 385	1 284	110	794	492	19 760
St Ann	1 658	8 694	4 956	980	65	989	876	18 218
Trelawny	2 420	8 343	3 315	562	129	477	370	15 616
St James	2 382	9 908	3 524	673	140	577	1 458	18 662
Hanover	2 161	6 823	3 384	807	145	440	439	14 199
Westmoreland	3 284	12 289	5 064	1 135	219	740	318	23 049
St Elizabeth	2 074	11 467	6 739	1 415	175	726	401	22 997
Manchester	1 138	8 226	4 568	737	51	614	613	15 947
Clarendon	3 480	20 298	8 675	1 844	163	1 231	654	36 345
St Catherine	3 511	24 734	8 526	2 036	125	1 315	1 577	41 824
TOTAL	32 239	163 989	68 179	15 932	1 643	10 646	11 118	303 746

Source: Ministry of Labour and Social Security

Grants³⁴ (Table 25.8C).

COVID-19 related responses through PATH included a number of interventions and provisions. During the year, the government increased cash grant disbursements to PATH beneficiaries in order to cushion the economic

fallout on vulnerable families due to the COVID-19 pandemic. The MLSS adopted the following measures, which resulted in increased cash grant expenditure for FY 2020/2021:

— Relaxation of compliance (attendance) requirements

34. The UNICEF grant was for three payment periods only—August, October and December 2020—for children with disabilities, and pregnant and lactating women. The special COVID payment was made to all eligible PATH beneficiaries in May, which was equivalent to one payment period. There was a back-to-school grant increase of \$5 000.00 to schoolchildren. The normal amount paid is \$3 500.00. Total benefit paid was \$8 500.00.

TABLE 25.8C
EXPENDITURE OF ADDITIONAL CASH GRANTS, BY
BENEFIT LEVEL AND RECIPIENTS
AS AT DECEMBER 2020

Additional Cash Grants paid within the PATH Bimonthly Cycle	Benefit Level (\$)	Recipients	Expenditure FY 20/21 \$
School Feeding	100 per day 150 per day	Children 3–5 Years Student Beneficiaries	2 498 947 100.00
We CARE	5 000	All children on PATH	923 295 000.00
Back to School	3 500	Student Beneficiaries	505 540 000.00
UNICEF	4 250	Children with Disabilities and Pregnant/Lactating Women	35 916 750.00

Source: Ministry of Labour and Social Security

for children and pregnant/lactating women, which resulted in full payments being made to beneficiaries eligible for payment within each payment cycle. Ordinarily, the compliance assessment would have resulted in only base benefit payments to non-compliant beneficiaries. The compliance assessment was suspended from the April 2020 payment cycle onwards, following school closures and physical distancing guidelines in public facilities.

- In May, PATH beneficiaries received an additional payment of their full benefits.
- In August, Cabinet approved a “We Care Grant”, payable to children in PATH families at a value of \$5 000.00 per child. The We Care Grant accompanied the regular bi-monthly August payment, as well as the Back-to-School Grant.
- The MLSS partnered with UNICEF Jamaica to deliver support to children with disabilities, as well as pregnant/lactating women. The partnership resulted in payments of \$4 250.00 to the beneficiaries for the August, October and December payment cycles. In addition, the families of 1 000 children that registered with the Early Stimulation Programme, as well as the Jamaica Council for Persons with Disabilities (JCPD), benefited from food packages in December.

Throughout the calendar year, post-secondary and tertiary grants were extended to PATH beneficiaries who completed secondary school and subsequently enrolled in further academic studies. PATH provided Post-Secondary Grants totalling \$58.7 million, and Tertiary Grants totalling \$430.9 million to 4 309 student beneficiaries of the Programme. Both the Tertiary Bursary and the Post-Secondary Grants are made available to beneficiaries upon

their application to receive the grants. Tertiary Bursaries at a value of \$100 000.00 are paid to beneficiaries within PATH families who are enrolled in undergraduate programmes in accredited institutions. The bursaries are available to beneficiaries on a yearly basis for the duration of their courses, provided the student maintains a Grade Point Average (GPA) of at least 2.5. Post-Secondary Grants are one-off payments and range from \$15 000.00 to \$30 000.00. These grants are paid to beneficiaries within PATH families who are enrolled in further education up to the Associate Degree level. Post-Secondary grant recipients include persons enrolled in Associate Degree programmes, Sixth Form, skills-training programmes, diploma courses and subject classes for the Caribbean Examinations Council (CXC).

The COVID-19 pandemic accelerated plans within the ministry to provide electronic payment options to PATH clients. It is intended that electronic payment options will enable the beneficiary family direct access to funds, as well as reduce the administrative expense and risk associated with cheque payments. In accordance with physical-distancing guidelines for the COVID-19 pandemic, the MLSS took steps to make payments to beneficiaries electronically. Beneficiary families in urban areas that ordinarily collected via post offices were advised to collect their payments from Paymaster Jamaica Ltd and Bill Express Ltd. Changes in the collection/delivery methods of PATH benefits resulted in an increase in the number of families being paid electronically, from 14.0 per cent in FY 2019/2020 to 33.0 per cent in FY 2020/2021.

PATH continued to collaborate with HEART/NSTA Trust to facilitate skills training among members of PATH households, under the **Steps-to-Work Programme (STW)**. As at December 31, a total of 328 PATH clients were enrolled in HEART institutions islandwide. Individuals within PATH households may opt for training in Cosmetology, Bartending, Electrical Installation, Carpentry, Motor Vehicle Repairs, Housekeeping, Practical Nursing, Welding, Plumbing and General Construction. Kingston & St Andrew, with 105 participants, was followed by St Catherine with 55, and Clarendon with 50, accounting for 64.0 per cent of the total. Five parishes had five or fewer persons participating in the skills training over the period. Since the implementation of the Entrepreneurship Grants, over 2 000 STW clients have been approved for Entrepreneurship Grants to operate businesses primarily in the areas of Agriculture and Trading. For the year, 432 grants were awarded at an approximate value of \$49.5 million. The number of grants approved for 2020 was below the targeted number of 1 000 grants for the year, due to the COVID-19 pandemic. This resulted in fewer trainees per training session in order to ensure physical distancing, as well as fewer training sessions in some parishes due to lockdown and curfew restrictions. Leading parishes in terms of participants were Manchester with 57,

St Catherine with 52, St Mary with 47, and Clarendon with 44.

The Secondary Education Completion (SEC) Intervention was launched in 2017 to provide members of PATH families with an opportunity to complete secondary level education. Participants are enrolled in full-time programmes that span 15 months of teaching in order to complete Caribbean Secondary Examination Certificate (CSEC) level qualifications, as well as vocational certification. The goal of the programme is to assist participants to achieve passes in five CSEC subjects and certification in one vocational course in order to prepare them for entry into the labour market. At the commencement of the 2019/2020 academic year, a cohort of 347 students was placed in 11 institutions islandwide. Approximately 55.0 per cent of the students who sat exams obtained passes in two or more CSEC subjects.

The Electronic Labour Exchange (ELE), through the On-the-Job Training (OJT) Programme, continued the placement of PATH beneficiaries as trainees for three months in various establishments. For the year under review, the ELE placed 489 persons into employment for the OJT Programme. To date, more than 2 289 persons within PATH families have participated in the OJT pilot. For the calendar year, 16.0 per cent of OJT participants

were permanently retained by the employers following the internship period.

The **Public Assistance Division** of MLSS manages a suite of provisions under the Rehabilitation Grant Programme, which is effected islandwide in support of vulnerable individuals and families. During the year, the Rehabilitation Programme disbursed 2 920 grants, totalling \$147.9 million. The majority of clients (1 288 or 44.1 per cent) benefited from Compassionate Grants. The majority of beneficiaries for this category was female (1 018) compared with 267 males, and 3 clients with unrecorded sex. A total of 386 females and 148 males received Rehabilitation Grants, while approximately 363 females and 218 males (and 11 clients with unrecorded sex) received assistance from the Emergency Grant programme. An estimated 434 females and 71 males received the Education and Social Intervention grants. In addition, the Short Term and Special Emergency Relief Grant was distributed to 8 513 individuals, with a total allocation of \$153.6 million. Table 25.9 provides data on the parish distribution of beneficiaries of the Rehabilitation Grant Programme.

The Division first responded to the COVID-19 pandemic during the first community quarantine on March 14. To date, the MLSS has distributed approximately 45 000 food packages, 7 500 hygiene packages, 2 996 cases of water, 1 893

TABLE 25.9
BENEFICIARIES OF PUBLIC ASSISTANCE BY PROGRAMME AND PARISH, 2020

PARISH	REHABILITATION		COMPASSIONATE		EMERGENCY		EDUCATION SOCIAL INTERVENTION		TOTAL	
	No.	Amount (\$'000)	No.	Amount (\$'000)	No.	Amount (\$'000)	No.	Amount (\$'000)	No.	Amount (\$'000)
Kingston & St Andrew	20	843 102	253	15 328 986	304	12 783 755	123	6 774 589.8	700	35 730 433.2
St Catherine	84	3 614 860	141	7 031 427	35	1 250 000	72	3 399 083.3	332	15 295 370.2
Clarendon	176	7 323 379	59	2 954 814	36	1 751 801	22	1 012 578	293	13 042 572.4
St James	11	518 790	104	5 312 586	19	1 230 000	49	1 434 329.9	183	8 495 705.9
St Mary	52	2 509 685	81	4 261 387	29	1 140 000	17	762 829.9	179	8 673 901.7
Portland	25	1 668 707	130	6 712 641	28	1 717 390.9	23	1 054 455	206	11 153 194.5
St Thomas	28	1 080 272	76	3 514 390	19	2 929 613	58	1 416 489.7	181	8 940 764.4
Manchester	68	3 149 556	89	4 194 612	30	2 116 560.7	15	346 990	202	9 807 718.0
St Elizabeth	29	1 411 039	34	2 371 247	24	1 991 457.7	11	292 300	98	6 066 043.9
Westmoreland	4	186 900	96	3 784 882	38	5 494 095.8	44	1 463 292.2	182	10 929 170.0
St Ann	6	181 976	67	3 310 017	23	1 494 490.9	10	305 991	106	5 292 474.6
Hanover	27	1 199 311	53	2 563 081	19	1 264 570	32	949 625	131	5 976 586.8
Trelawny	4	578 879	109	5 514 559	14	1 471 143.2	35	919 273	162	8 483 853.9
Total	534	24 266 456	1 292	66 854 628	618	36 634 878.4	511	20 131 082.6	2 955	147 887 789.6

Source: Ministry of Labour and Social Security

cases of juice, numerous assorted snacks and personal care items to families in quarantine and other families affected by the pandemic across the island. In addition, donations were made by the Culture Health Arts Sports and Education (CHASE) Fund to approximately 105 victims of the May Pen Market fire, with grants totalling \$1.89 million. Support was also received from the private sector and other donors. The humanitarian response to affected victims is ongoing and the MLSS has continued to provide islandwide food support to families affected by the COVID-19 pandemic.

The **Board of Supervision** (BOS) continued to manage the care, relief, protection and rehabilitation of destitute persons, under the ambit of the Poor Relief system. Interventions were effected through the parish infirmaries/residential institutions and the Golden Age Homes, as well as through programmes of assistance with basic needs and education support for adults and children. Alongside the routine programmes for relief of the registered poor, the public health crisis caused by the pandemic also elicited targeted responses from the BOS in relation to support to vulnerable persons. Measures included temporary shelter, daily meals, care packages, and sanitization of common areas for homeless persons, and further extension of financial assistance for children. With respect to the residential facilities, the pandemic responses included restriction of visitors, provision of isolation areas, and restriction in new admissions. The improvements to physical infrastructure within the institutions continued throughout the period, in an effort to advance quality of care and protection. Over the review period, the BOS served 14 769 clients on the Outdoor programme, 1 441 clients on the Indoor programme and 379 on the Temporary Poor programme.

For the **Outdoor** programme, the BOS expended \$55 439.6 million on allowances for 14 769 wards over the year. In terms of the registered number as at the end of December, there were 13 624 (6 938 males). Some 22.2 per cent was from the KSAMC, with 13.8 per cent from St Catherine, and the next largest proportion of 10.7 per cent from St James. Some 1 360 persons (756 males) were added during the year, while 609 persons died (323 males) and 536 (329 females) were struck off the register. Within the Outdoor population of registrants, 508 were under 20 years of age (272 males), while 6 759 (3 669 males) were 60 years and older. A total of \$132.7 million was expended on the Outdoor assistance programme, inclusive of 14.7 million for transport, \$25.4 million for school support, and approximately \$9.0 million each for rental and medical comfort.

Temporary Poor assistance was provided to 379 persons (188 males) over the year, at an expenditure of \$5.1 million. The Kingston & St Andrew Municipal

Corporation (186 clients) and St James (98 clients) had the largest numbers and expenditure, with \$1.6 million and \$1.8 million, respectively. A total of 320 **children** (168 males) were registered with the BOS in their own right, while there were 3 085 children (1 550 males) as dependents of registered adults. There were only two children living in residential facilities under the programme. Of an estimated **Street People** population of 2 042 (1 708 males), 274 were registered with BOS, consisting of 225 males and 49 females; 210 of these persons were receiving shelter care, 77.1 per cent from KSAMC. An estimated 54.1 per cent of street people were not in receipt of any assistance from the programme. The **Indigent Housing programme** served 646 families, with support to the building and repairing of houses/dwellings. Notably, some 340 families were from St Elizabeth, where 22 dwellings were repaired and seven built. Financial support to the programme came from the Constituency Development Fund in collaboration with Food for the Poor, in addition to resources from the Ministry of Local Government and Rural Development (MLGRD). Overall, 28 new units were constructed, and 307 repaired, at a cost of \$28.0 million.

For the **Indoor programme**, 1 305 clients were being served at year-end, comprising 759 males and 546 females. The KSAMC constituted 32.1 per cent of the total residents. With an expenditure of \$404.8 million, the Indoor support included medical assistance, food, transportation, shelter and clothing. Other expenditure items included building maintenance and upkeep, utilities and sanitation, inter alia. Some \$175.1 million was spent on food, \$40.2 million on drugs, \$70.7 million on utilities, and \$47.7 million on sanitation, among other expenditure. Within Indoor facilities there were no wards under 20 years of age; 405 persons (227 males) were between 20 and 59 years, and 900 (532 males) were 60 years and older. Non-governmental partners, including non-profit organizations, faith-based organizations, private sector and civil society continued to provide funding and other support to the Indoor and Outdoor programmes of the BOS. Over \$43.7 million was contributed to the Indoor Poor Relief programme, and some \$5.5 million to the Outdoor Poor Relief programme.

To respond to the impact of the COVID-19 pandemic on the most vulnerable, the MLGRD, through its social protection programme, provided care packages islandwide to the homeless population, and a Special Feeding Programme was implemented to provide at least two meals per day to the homeless. The Church Street shelter was opened to provide accommodation to over 70 homeless persons in Downtown Kingston; the Church Street Soup Kitchen was also extended to provide meals to the homeless. Temporary shelters were also established in April for Linstead and Spanish Town in St Catherine to provide a refuge for street people. Additionally, 6 253

elderly registered poor were supplied with food baskets over a three-month period.

In ensuring the safety of the elderly population during the COVID-19 pandemic, a comprehensive cleaning and sanitization exercise was carried out at all infirmaries, the Vineyard Town and Denham Town Golden Age Homes, and the Marie Atkins Night Shelter. A total of 64 cleaners and 30 screeners have been temporarily employed in April to maintain the facilities' cleanliness and screen all persons entering the locations. All infirmaries and Golden Age Homes were provided with renovated buildings to be used as isolation areas. The Clarendon infirmary and the Vineyard Town Golden Age Home also renovated two spaces to accommodate social cases from the hospitals.

The BOS continued to focus on its transformational plan in an effort to improve performance and effectiveness. The plan of action focused on eight strategic pillars, namely: People development and Involvement; Infrastructural development; Public awareness, promotion and image rebuilding; Rehabilitation-focused care and service; Partnership development; Integrated management; Quality of Human Service; and Legislative reform. Achievements over the year included the completion of new wards at the Portland, Manchester and St James residential facilities, while new wards and staff quarters were constructed in Westmoreland. New Drop-in Centres were opened in St Thomas and Trelawny, while funds were provided for the purchase of industrial laundry and other equipment for facilities islandwide. Staff training and certification continued throughout the year.

Social Insurance

For the **National Insurance Scheme (NIS)**, there was a 9.1 per cent decrease in the recorded number of pension beneficiaries in comparison with the previous year, with

TABLE 25.10
NIS PENSIONS PAID
AS AT DECEMBER 31, 2020

TYPE OF BENEFIT	Male	Female	Total
Retirement (Old Age)	39 523	48 723	88 246
Widows/Widowers	2 600	17 917	20 517
Invalidity	4 485	2 792	7 277
Special Anniversary	1	0	1
Employment Injury Disablement	899	165	1 064
Sugar Workers	2	2	4
Orphans	1	29	30
Special Workers	1	10	11
TOTAL	47 512	69 638	117 150

Source: Ministry of Labour and Social Security

117 150 across all categories (Table 25.10). This was influenced by decreases in each major category. The largest pension category, Old Age, numbered 88 246 persons (48 723 female), and this represented a decrease by 8.4 per cent relative to the previous year.

The performance of the **National Insurance Fund (NIF, the Fund)** over the past year was negatively affected by the effects on financial markets brought about by the COVID-19 pandemic. There was a 0.7 per cent marginal decline year-over-year in the Fund's Net Asset Value, moving from \$120.9 billion to \$121.8 billion in 2019. The decline in the Fund's Net Asset Value was mainly attributable to the 18.4 per cent decline in the value of the Equity portfolio to \$32.58 billion when compared with the previous year. The decline in the portfolio occurred against the backdrop of a 29.6 per cent decrease in the Jamaica Stock Exchange Main Market Index, brought on by the effects of the pandemic. This portfolio accounted for 27.3 per cent of the Net Asset Value of the Fund. Dividend inflows for the year amounted to \$718.55 million, down \$278.35 million (27.9 per cent) compared with the previous year. This had a negative impact on dividend income.

The impact of the decline in the Equity portfolio was tempered by the 11.9 per cent increase in the Real Estate portfolio to \$19.06 billion. This increase was attributable to the capital appreciation from the revaluation of the property holdings. The Real Estate portfolio accounted for 15.8 per cent of the Net Asset Value of the Fund. Rental income for the year amounted to \$360.56 million, an increase of \$16.3 million (4.7 per cent) relative to the previous year. The Fixed Income portfolio, which stood at \$66.69 billion at December 31, exhibited a 5.8 per cent increase. This portfolio accounted for 55.2 per cent of the overall Net Asset Value. Despite the low interest rates

TABLE 25.11
NATIONAL INSURANCE FUND INCOME AND
EXPENDITURE 2019 AND 2020
(UNAUDITED STATEMENTS) \$MILLION

	2019	2020
INCOME		
Contribution (less NHF)	19 455.2	21 653.6
Investment Income	18 388	1 254.6
Total	37 843.2	22 908.2
EXPENDITURE		
NIS Benefits Paid	19 969.6	20 391.6
Administrative Expenses	1 414.7	2 147.5
Total	21 384.3	22 539.1
NET INCOME	16 458.9	369.1

Source: Ministry of Labour & Social Security

experienced over the review period, interest income increased by \$357.28 million (8.1 per cent) to \$4.81 billion.

Total Investment Income for the year amounted to \$1.255 billion, a decline of \$17.13 billion (93.2 per cent) relative to the previous year (Table 25.11). The main contributor to this was the \$17.23 billion decrease in unrealized gain on investments to an unrealized loss of \$4.64 billion, which was primarily driven by the lower than expected performance of the Equity portfolio. The continued growth of the Net Asset Value of the Fund is against the backdrop that the National Insurance Scheme (NIS) closed in credit (contributions less benefits) of \$7.3 million. This positive year-end balance was as a result of the increased contribution rates from 5.5 per cent to 6.0 per cent as of April 1. Despite the challenges brought about by the COVID-19 pandemic, which affected the speed and progress of several plans and projects, the Fund continued redevelopment works for selected NIS offices across the island in a bid to ensure improved servicing environments for both employees and pensioners. Construction of offices to house the St Ann Parish Office, completed in June 2019, opened to serve the public in November. Comprehensive refurbishment of the St James Parish Office was conducted during the year and the project was completed in August.

CULTURE

The Ministry of Culture, Gender, Entertainment and Sport (MCGES)

Policy and programmatic initiatives for the culture portfolio are principally managed by the Ministry of Culture, Gender, Entertainment and Sport (MCGES) through the Culture and Creative Industries Policy Development and Monitoring Branch and its agencies.³⁵

The ministry continued its partnership with the Jamaica Business Development Commission (JBDC) on the Economic Opportunities Project in Port Royal. This project was first initiated by a joint Memorandum of Agreement between the entities in 2019. Over a three-month period, 30 persons were trained under the project in craft production and product development. Several residents who were exposed to the training have been producing items at the commercial level. Training also continued in areas such as gastronomy, food production, and agro-processing. The aim of this phase of the project was to empower residents to take advantage of economic opportunities that were presented from the development of the cruise-shipping pier in the community. The

programme's completion was halted due to the onset of the COVID-19 pandemic. Nonetheless, in October, 20 residents who completed the programme were awarded certificates and were granted production and cooking equipment to continue producing for their small businesses.

The Sustainable Heritage Tourism Programme, supported by the Organization of American States (OAS), was concluded in June 2020. This project was the third and final phase of a long-term initiative to expand the socio-economic potential of cultural heritage in the Caribbean region. The project was facilitated through a Memorandum of Understanding (MOU) with the MCGES and resulted in the engagement of several key stakeholder agencies. This final phase focused on the installation and management of the Jamaica National Register, using the Arches platform, and the development of a Sustainable Heritage Tourism Standard.

A five-year MOU (2020–2024) was also signed between the MCGES and the managers of the Blue and John Crow Mountains World Heritage Site and the Jamaica Conservation & Development Fund National Park in November. This is to support the management of the Park and World Heritage site, specifically, the preservation of intangible and tangible cultural heritage resources.

National Cultural and Creative Industries Council (NCCIC)

The NCCIC is the arm of the ministry entrusted with oversight for the implementation of UNESCO's 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. The Council prepared and submitted the first Quadrennial Periodic Report (QPR) for the period 2016–2020. The report outlined the policies and measures that the Jamaican State Party has adopted and the challenges encountered in implementing the Convention. This report was also a key instrument for civil society to engage with government officials in assessing progress made to protect and promote the diversity of cultural expressions.

In partnership with the JBDC, the NCCIC submitted a proposal for funding to the International Fund for Cultural Diversity (IFCD), to address the gap in the provision of accurate statistical data on the contribution of the cultural and creative industries to Jamaica's gross domestic product (GDP). The project was reviewed by a panel of experts established by UNESCO and was approved and awarded a sum of US\$72 197.00.

In recognition of a need to promulgate legislation for the

35. Institute of Jamaica (IOJ); Jamaica National Heritage Trust (JNHT); the Jamaica Cultural Development Commission (JCDC); the National Library of Jamaica (NLJ); Creative Production and Training Centre (CPTC) and the Jamaica National Commission for UNESCO.

largely informal cultural and creative industries in Jamaica, the NCCIC applied to the EU/UNESCO Expert Facility on the Governance of Culture for the implementation of the 2005 Convention. The Expert Facility acts as an international pool of recognized experts, with experience in designing and implementing policies to support cultural and creative sectors. The NCCIC application was successful and a two-year action plan was implemented. The project's main output is a Cultural and Creative Industries Act for Jamaica (see section on UNESCO).

Jamaica National Council on Reparations (JNCR)

The JNCR commenced the formulation of a national policy on reparation, in keeping with its mandate to provide advice to the Government of Jamaica on modalities to pursue the claim for reparation. A series of virtual consultations were held to build awareness and to solicit the opinions of the Jamaican population.

Creative Production and Training Centre (CPTC)

The CPTC continued to carry out its mandate to produce, market and broadcast authentic Jamaican historical, cultural and lifestyle content. The entity aims to promote positive values and attitudes, while nurturing a sense of national pride. Over the period, 85 students were trained. Some 52 students were trained in Voice and Speech; Techniques of Video Production (16); Principles of Non-Linear Editing (5); Customized Speech (5); and Audio Engineering (7).

National Library of Jamaica (NLJ)

Despite the challenges brought on by the pandemic, the NLJ managed to successfully host several virtual events, most of which were held in the last quarter of 2020. Through a partnership between the NLJ and EBSCO Information Services, an EBSCO Database Training was held under the theme “EBSCO undaunted by COVID-19: Connecting Jamaicans to full text resources”. The NLJ, along with five other participating libraries (African Caribbean Institute of Jamaica, Scientific Research Council, Trench Town Polytechnic College, National Works Agency, Bureau of Standards Jamaica) received a five-month extension of free trial to access databases and other EBSCO resources. The databases have been added to the NLJ's EBSCO account. Full text resources were accessible via the NLJ, as well as from other libraries that previously provided IP addresses to EBSCO.

In celebration of World Day of Audio-Visual Heritage 2020, the NLJ partnered with key stakeholders to deliver a webinar under the theme “Your Window to the World”. A presentation was delivered on “Preserving Audio-visual Heritage for Posterity” and the NLJ showcased its treasure

trove of Jamaican audio-visual resources. The opportunity was used to revive the “Audio-visual Information Network (AVIN)” and rename it “Jamaica Audio-visual Information Network (JAVIN)”.

The NLJ also hosted a Publishers and Authors Workshop in the final quarter of the year, which included self-publishers and specialists from Jamaica's book industry.

Jamaica Cultural Development Commission (JCDC)

The restrictions due to the COVID-19 pandemic led to the cancellation of events. These included:

- Performing Arts National Finals (including remaining Parish Finals)
- Unique Arts Competitions (Literary, Culinary and Visual Arts)
- Entertainment Arts Competitions (Jamaica Children's Gospel, Jamaica Festival Queen, World Reggae Dance and The Big Stage).

There was also a reduction in income from revenue-generating initiatives such as the rental of the Ranny Williams Entertainment Centre; Artiste Management Services; and Events Management and Production Services.

The Commission hosted the annual Emancipation/Independence celebrations under the theme “Resilient and Strong...Let's Celebrate Jamaica 58”. The week of celebratory events included: a national church service, Emancipation Vigil ceremonies, and Independence Day flag raising ceremonies. The annual Grand Gala was replaced with Independence Spectacular, a virtual alternative to the independence celebrations. A virtual street party was also livestreamed on social media, with approximately 152 696 viewers.

Through a partnership with the MCGES, reggae month was celebrated under the theme “Come Ketch the Riddim” and the major events were streamed live and viewed by some 71 000 individuals across 30 different countries. The Festival of Arts received approximately 11 031 entries and 33 093 participants. Culinary Arts Workshops commenced in January but ended prematurely on March 9, owing to the COVID-19 pandemic; 197 persons were trained. The Jamaica Festival Song Competition was held virtually and was viewed by 65 875 persons.

National Heritage week was observed from October 18 to 25 under the theme “Celebrating a Heritage of Resilience and Pride”, 845 persons attended the events which were held at the parish level. Through the Commission's community and customer service programmes, four regional club consultations were held virtually during November and December.

Institute of Jamaica (IOJ)

The Institute of Jamaica and its divisions³⁶ continued to spearhead numerous initiatives to highlight and safeguard cultural heritage, through research and development, exhibitions, seminars and education outreach.

The African Caribbean Institute of Jamaica/Jamaica Memory Bank (ACIJ/JMB) commenced its annual activities with an exhibition entitled **A Two Way Journey – Africans, Culture and the Diaspora**, with 120 persons attending. However, due to the pandemic, tours for the exhibition were cancelled; a virtual tour of the exhibition was uploaded to IOJ's social media platform and attracted 423 viewers. Other activities included the following virtual lectures and outreach programmes: *Lifting the Veil: Unravelling the Myths Pertaining to Zion*; ACIJ/JMB in the Streets of Kingston: *Hair and Identity*; 'What is Revival' video presentation; *Development of Religion in Jamaica*; and *Exploring Jonkonnu in the 21st Century*. Overall, 3 694 persons viewed.

Liberty Hall partnered with the Nigerian High Commission to host Sankofa XIV under the theme "Decolonisation in West Africa: Nigeria and Ghana". The event had 130 individuals in attendance, which included secondary level students, teachers, historians, students from the Adult Computer Literacy Programme, as well as delegates from Nigeria. Liberty Hall also hosted the 11th annual staging of the Marcus Mosiah Garvey Lecture, which was streamed on the organization's and IOJ's social media platforms. The theme for the event was, "Race First and Black Lives Matter". Over the period, representatives from the Institute were interviewed on the following topics: the legacy of Marcus Garvey in preserving aspects of Jamaica's rich history and the applicability of Garveyism in the 21st century; the philosophy of Marcus Garvey on education, slavery and racial pride; social, political, and economic conditions that Blacks experienced in the early post-emancipation period; and Garvey's involvement in local and international politics.

The National Gallery of Jamaica collaborated with National Museum West (the Montego Bay Cultural Centre) to host a virtual summer workshop with 55 students. The Gallery also partnered with the MCGES and the National Museum in February to host an exhibition entitled 'Jamaica, Jamaica'.

Over the period, the **Natural History Museum of Jamaica (NHMJ)** produced 22 articles, abstracts and research papers covering natural history and folklore,

species and ecosystems conservation, invasive species and ecosystem services. The museum hosted its annual Earth Day Competition under the theme '*Countdown to 2030: Vision of a Healthy Environment*'. A total of 127 entries were received. International Day for Biological Diversity was celebrated under the theme 'Our Solutions are in Nature' with special activities, including videos and presentations, done to commemorate the day. The annual Science and Technology month celebrations, were held in November, included four virtual programmes under the theme '*NHMJ LIVE! Science Fun Zone*'. Approximately 260 persons participated in the sessions. The NHMJ received additional funding of approximately \$400 000.00 from the National Environment and Planning Agency (NEPA), for its fourth year of activities of the Mason River Protected Area Invasive Species Control and Habitat Restoration project.

The annual Children Symposium event, which targeted youth between 12 and 25 years was hosted virtually under the theme '*Views YOU Choose: Real talk*'. This was a platform for students to communicate their issues in a safe and comfortable space. A total of 66 students participated. The East Street & Greater Portmore Junior Centres and the Simón Bolívar Cultural Centre together hosted a workshop that targeted parents and focused on '*Balancing Life during COVID-19*'. As part of Youth and Parent Month celebrations, the 10th hosting of the Heroes for Children Project was launched on the IOJ's social media platform; this attracted 272 viewers.

Jamaica National Heritage Trust (JNHT)

The JNHT, through its mandate of preserving and safeguarding the island's natural and cultural heritage and associated intangible assets, undertook a number of activities. These activities included the Emancipation Jubilee celebration; installation of signs and storyboards at the Royal Naval Hospital in Port Royal; the National Project for Labour Day; Archival Research in St Ann; and the Seville Heritage Park Rehabilitation Project. Due to the impact of the COVID-19 pandemic, the annual Emancipation Jubilee was not held at the Seville Heritage Park. Instead, a televised video production in collaboration with the Creative Production and Training Centre was aired on local television at a cost of \$3.0 million. The JNHT continued its project of erecting new sign markers and storyboards at the Royal Naval Hospital.

A site visit and an appraisal³⁷ were conducted at The Green Wall Sugar Estate in St Thomas. Artefacts and visible

36. Divisions of the IOJ are: African Caribbean Institute of Jamaica/Jamaica Memory Bank (ACIJ/JMB); Liberty Hall: The Legacy of Marcus Garvey; National Gallery of Jamaica; National Museum Jamaica; Jamaica Music Museum; Natural History Museum of Jamaica; and the Programmes Coordination Division/Junior Centres.

37. The Appraisal was completed due to an impending housing development in the area.

historical structures—including a large animal mill, the most dominant feature at the site—were recovered from this visit.

The National Labour Day project 2020 was organized through the Ministry of Culture, Gender, Entertainment and Sport (MCGES), in collaboration with the JNHT, the Kingston & St Andrew Municipal Corporation (KSAMC) and the Jamaica Defence Force (JDF) to conserve and restore the St William Grant Park in Downtown Parade, Kingston. The JNHT was also responsible for the conservation of the two statues placed on opposite sides of the park—the Right Excellent Norman Washington Manley and Sir Alexander Bustamante.

In response to a request made by a developer, desirous of conducting mining exploration in the South East St Ann, a heritage survey was conducted to assess the impact of mining on the protected areas. At the end of the survey, some 300 historical assets were recorded. As a result, it was recommended that:

- all significant assets be identified and protected under the JNHT Act, 1985
- a Preservation Notice (sections 19 and 20, JNHT Act, 1985) must be placed on the site by the JNHT to ensure its security
- the developer should provide the JNHT with a work schedule so that the agency can make the necessary and appropriate arrangements to monitor national monuments and other significant cultural heritage resources in the area
- in the event of an accidental find of significant archaeological resources, the Archaeology Division of the JNHT in collaboration with the developer, should promptly and appropriately ensure the preservation of the asset(s) in-situ or ex-situ.

The following sites were declared under the JNHT Act of 1985:

- Albion Aqueduct & Sugar Mill, St Thomas
- Greenwall Sugar Works, St Thomas
- Ruin of Old Anglican Church, Church Corner, St Thomas
- Malabre House, Kingston
- Langley Great House & Coffee Works, St Andrew
- Fairfield Moravian Church, Manchester
- Trinity Baptist Church, Porus, Manchester
- Annotto Bay Baptist Church, St Mary
- Fort Johnston, St Catherine
- Old Priory Church Ruin, St Ann
- St Ann's Bay Court House, St Ann.

Through a grant of approximately \$10.4 million from the Tourism Enhancement Fund (TEF), the JNHT was

able to embark on the Seville Park Rehabilitation Project. A memorandum of understanding (MOU) was signed between the JNHT and Tourism Product Development Company (TPDCo). A project grant of \$25.0 million was donated by TPDCo. Some aspects of the project were delayed due to the pandemic; however, the Trust continued to work towards its completion.

A tripartite MOU between the MCGES, the JNHT and the Urban Development Corporation (UDC) was also signed to declare Fort Rocky in Port Royal as Jamaica's first Entertainment Zone. The JNHT was mandated to develop the site for tours, day and night entertainment events, recreation, production and filming.

CHASE Fund

As at December 31, the CHASE Fund approved grants totalling \$126.6 million in support of 1 312 arts and culture related initiatives and projects. The categories that received the majority of the allocation were: Performing Arts (\$45.1 million); Heritage and Craft (\$30.4 million); and Music, Film and Media (\$18.9 million){Table 25.12}.

TABLE 25.12
CHASE FUND, 2020

Category	No. of Projects	Amount Approved \$
Performing Arts	19	45 054 500
Literary works	3	1 685 000
Libraries and Archives	4	17 620 440
Visual Arts	0	0
Museums	0	0
Heritage and Craft	5	30 417 000
Music, Film and Media	3	18 985 000
Historic Sites and Monuments	0	0
Scholarships and Education Grants	26	12 887 324
Total	60	126 649 264

Source: Culture, Health, Arts, Sports and Education Fund (CHASE)

Jamaica National Commission for UNESCO

For the period, the Jamaica National Commission for UNESCO embarked on a workshop 'UNESCO Convention on the Means of Prohibiting and Preventing the illicit import and export and transfer of ownership of Cultural Property' and 'the UNIDROIT³⁸ Convention on Stolen or Illegally Exported Cultural Objects'. The project's objective was to equip the public and private sector with tools, skills and the necessary knowledge to develop and apply preventative measures to catalogue and protect cultural

38. International Institute for the Unification of Private Law.

properties of an archaeological or non-archaeological nature. The Commission noted that conditions will be created to allow for an effective and rapid response (involving various stakeholders) to prevent illicit trafficking of cultural properties at the local, national and regional levels, as well as improve restitution processes. This was done through raising awareness on the need to develop and apply effective national legislation and to cooperate at the international level. Special attention was given to local communities, youth and the tourism sector. The training supported national efforts to ratify and effectively implement the 1970 Convention and the UNIDROIT Convention on Stolen or Illegally Exported Cultural Objects. The training was also aimed at facilitating sub-regional cooperation in its effort to exchange information. The total cost of the project was \$4.8 million.

OUTLOOK

Research relating to childcare and protection, as well as the implementation and advancement of key programmes will be the main areas of focus. The Caribbean Child Development Centre (CCDC) aims to complete a study, *Teaching of Literacy at Grade 1 in primary schools in Jamaica* and another on *Children's use of media in Jamaica*. Meanwhile, the Child Protection and Family Services Agency (CPFSA) will seek to implement the Plan of Action created in response to the findings of the study, *Children Living and Working on the Streets*. As the Transitional Living Programme for Children in State Care ended as a project in December 2020, the CPFSA will continue to work towards its full institutionalization in the operations of the Agency.

In light of the progress made in identifying a greater number of persons with disabilities, the Jamaica Council for Persons with Disabilities aims to boost its registration capacity by overhauling the Management Information System (MIS) that supports the electronic component of the National Registry, key to which will be the forging of partnerships for its completion. The completion and approval of the Codes of Practice will remain a priority for the Council. At least three codes were on track for completion in 2021—Education and Training; Employment; and Health Care and Facilities.

Jamaica Association on Intellectual Disabilities' plans for expansion of services will focus on post-secondary training and transition options for young adults with intellectual disabilities. Additionally, its outreach project will give attention to tracking and providing recreational

activities to elderly persons with intellectual disabilities.

With the growing demand for vocational training and employment, the Abilities Foundation will focus on providing strategic input to the Ministry of Labour and Social Security (MLSS) on the expansion of services to rural areas through the engagement of collaborating agencies. The Foundation will also expand its course offerings with the introduction of Web Design and Computer Graphics in 2021/2022, made possible through the Universal Service Fund that will support the upgrading of the computer lab, *inter alia*.

In the area of gender, it is anticipated that the coming year will see the passing of the Sexual Harassment (Prevention) Act 2020, and the establishment of the Sexual Harassment (SH) Tribunal. It is also anticipated that the recruitment and training of investigative field officers will be conducted in accordance with the Act. The revised National Policy for Gender Equality is expected to be adopted and the additional shelters for victims of gender-based violence will be operationalised. In support to adolescent parents, it is expected that construction will be completed on the Santa Cruz outreach centre, the Mandeville day nursery and the administrative office at the Kingston site. Teaching and research programmes will continue in an effort to meet the growing demand for gender analysts and researchers to facilitate integration of gender perspectives in development policies and programmes across sectors.

A Tracer Study on PATH beneficiary households is expected to be completed, examining the status and living conditions of a sample of families, to determine programme effects. This is being executed by the MLSS under the GOJ/IDB Integrated Support to the Jamaica Social Protection Strategy Project. The project will also support initiatives for the elderly and children with disabilities, as well as infrastructural improvements to service delivery locations within the ministry.

For the upcoming year, the National Insurance Fund intends to focus on several high-priority areas that will include: (a) Participation in Investment Projects to maximize rates of return, generate strong cash flows, and hedge against inflation; (b) Increase in the Insurable Wage Ceiling for the National Insurance Scheme, which will move to \$3.0 million from \$1.5 million, on April 1, 2021; (c) Development of land and continued infrastructure works across several parishes; (d) Strengthening Accountability and Governance, through an updated investment policy and governance administration. ■

INDICES AND APPENDICES

List of Tables

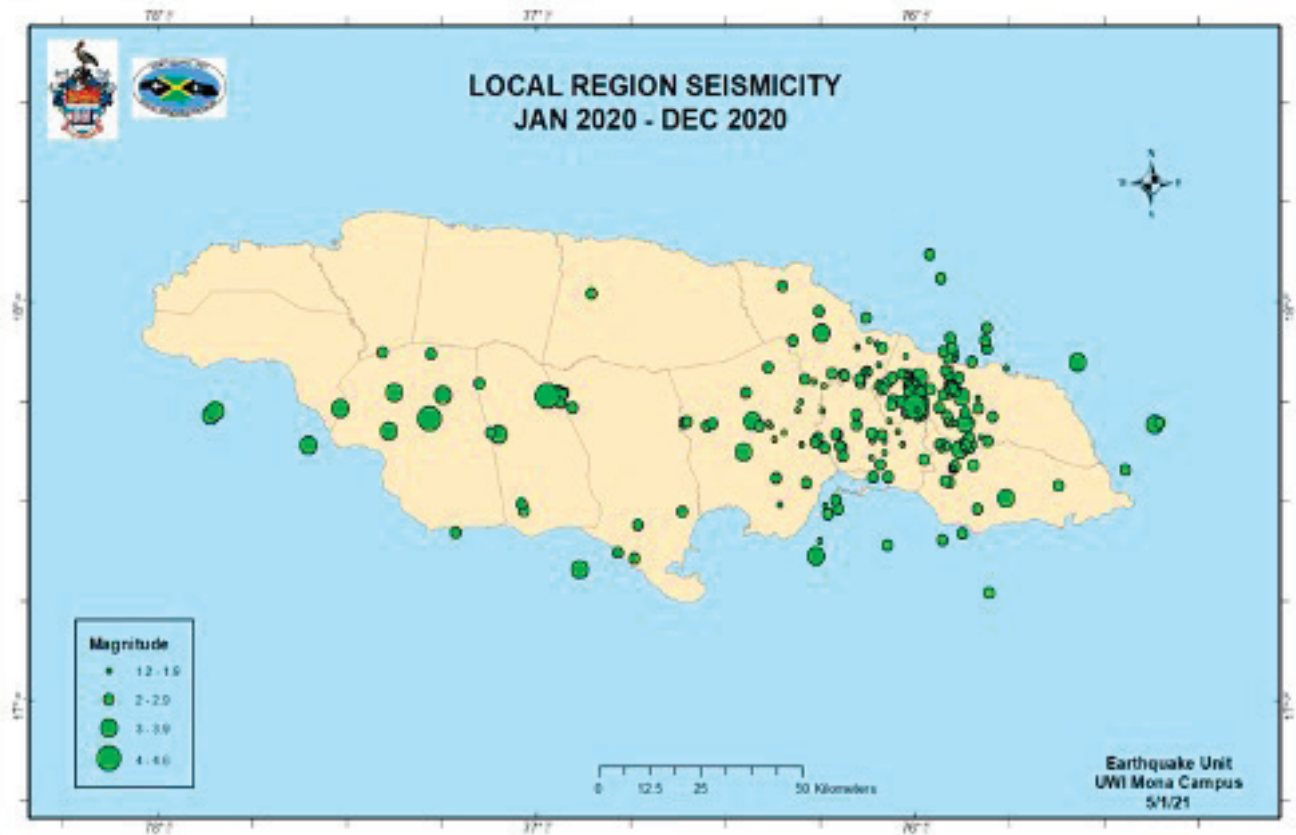
List of Figures

Abbreviations and Acronyms

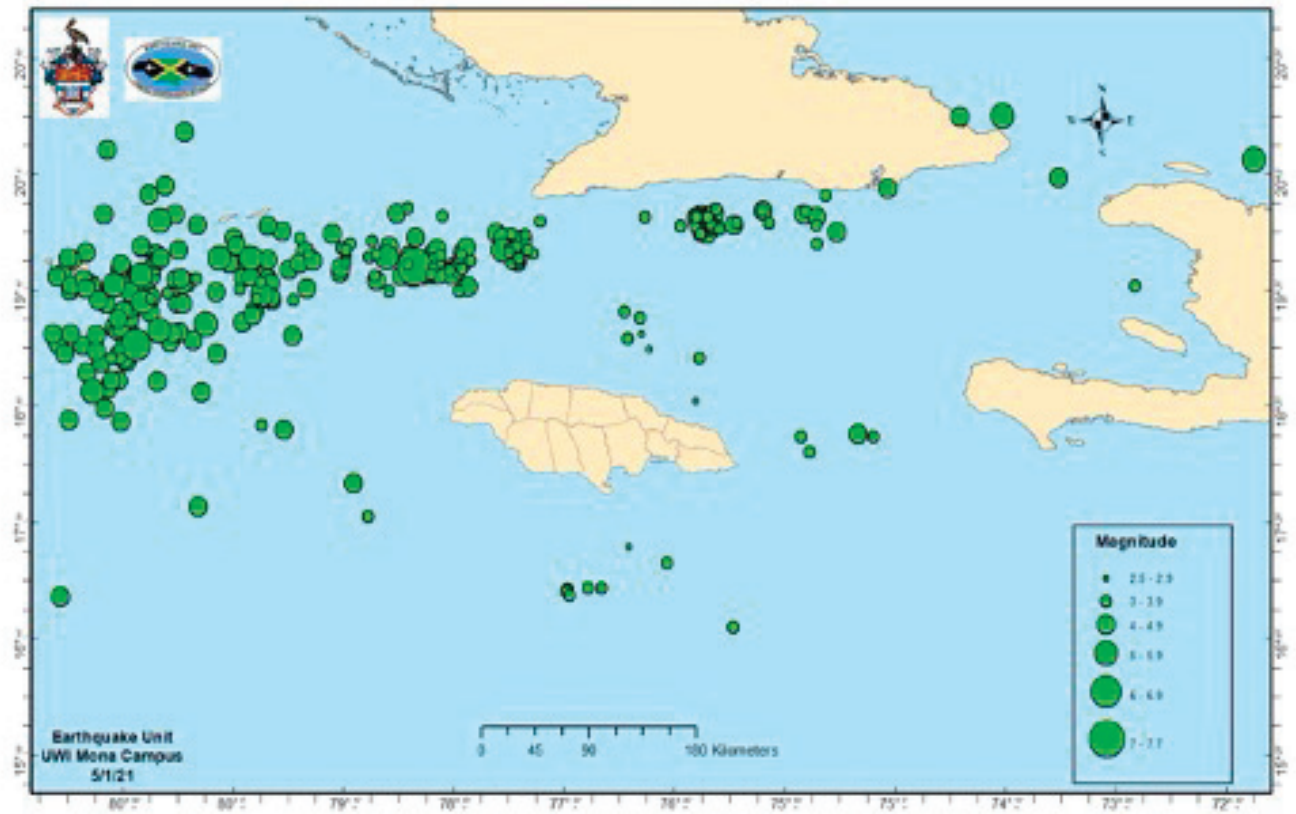
Glossary of Terms

Index

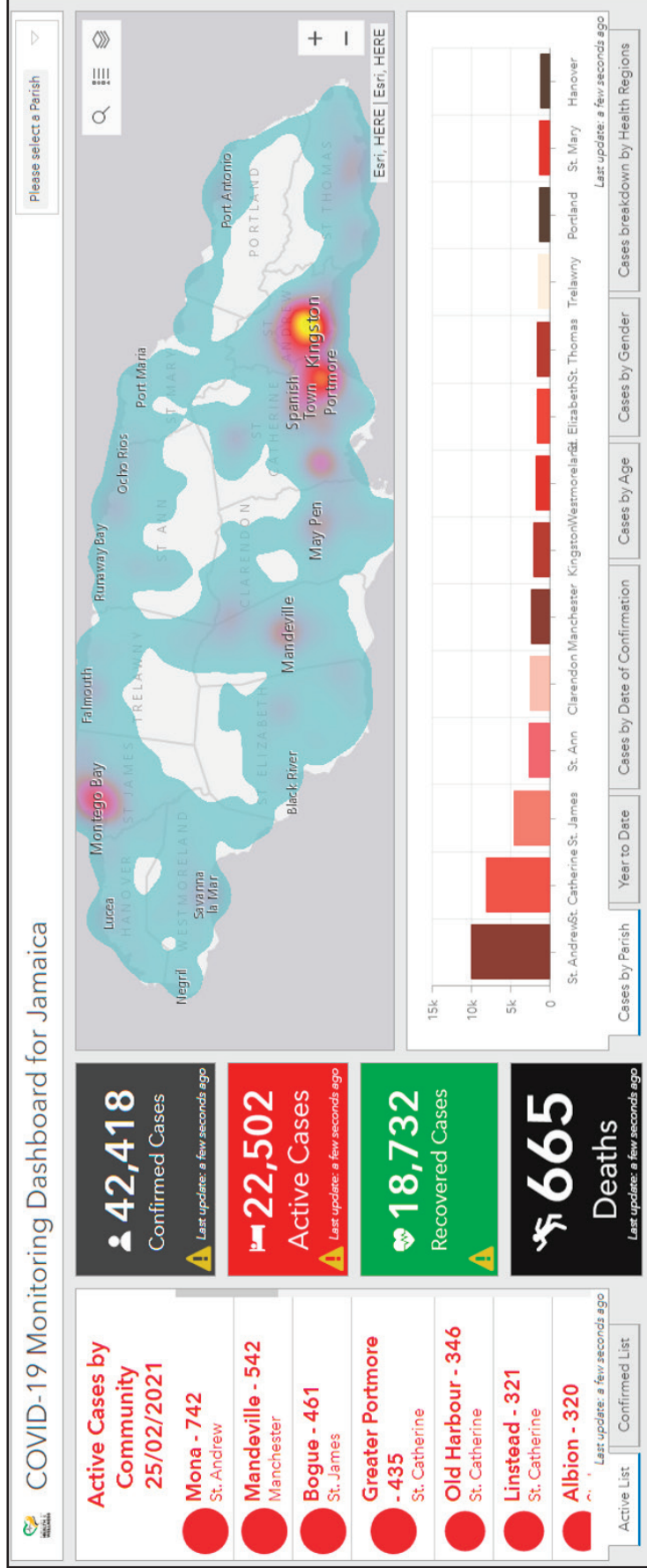
APPENDIX 3A



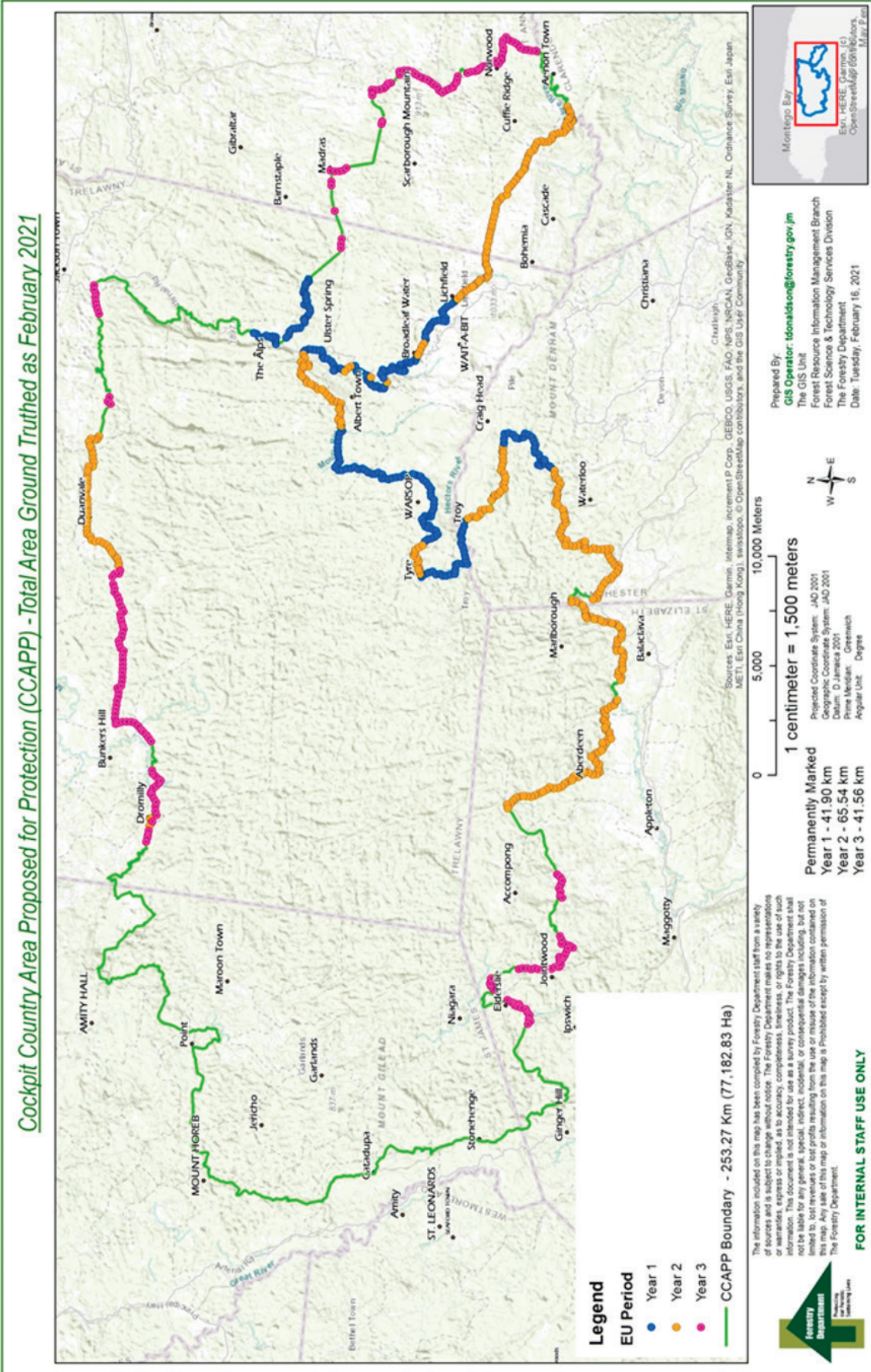
**NEAR REGION SEISMICITY
JAN 2020 - DEC 2020**



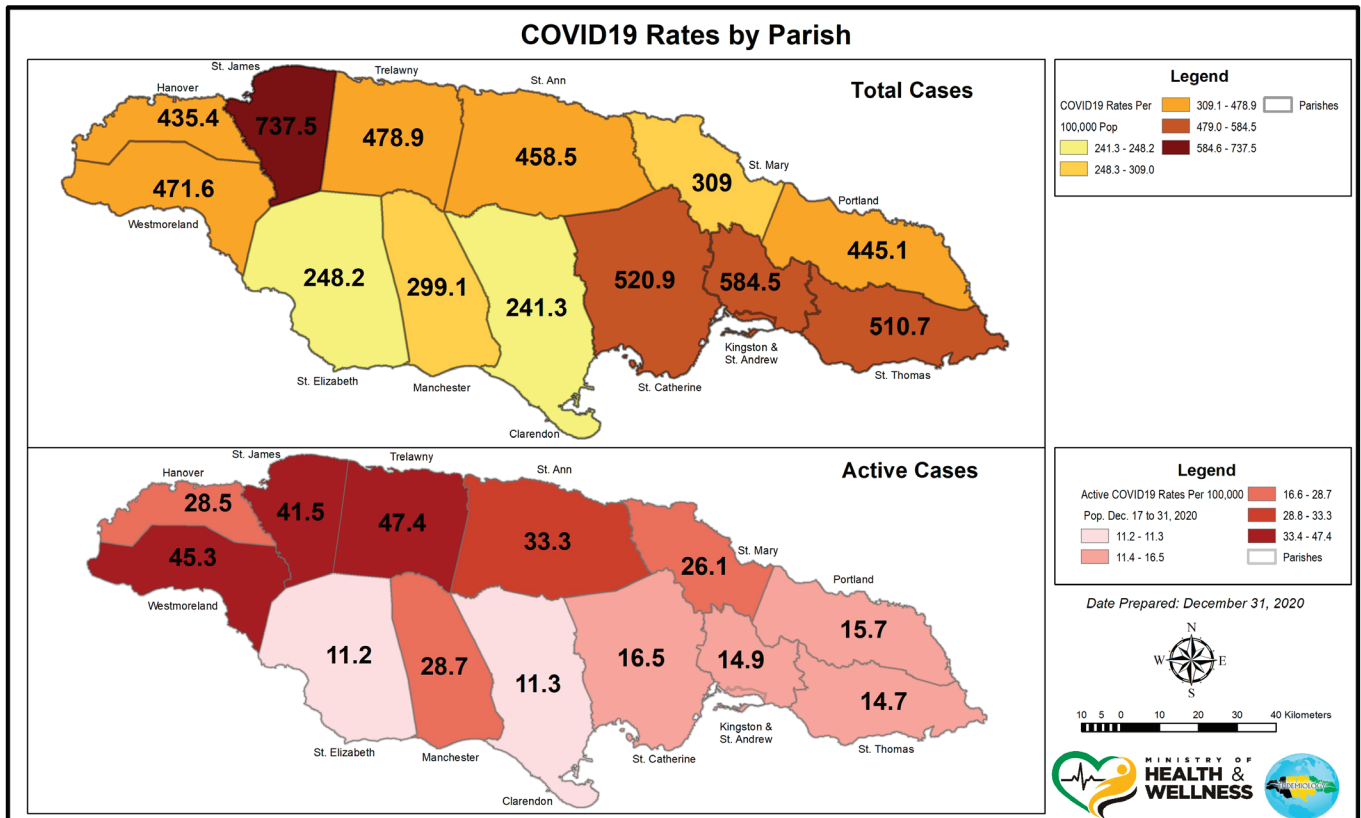
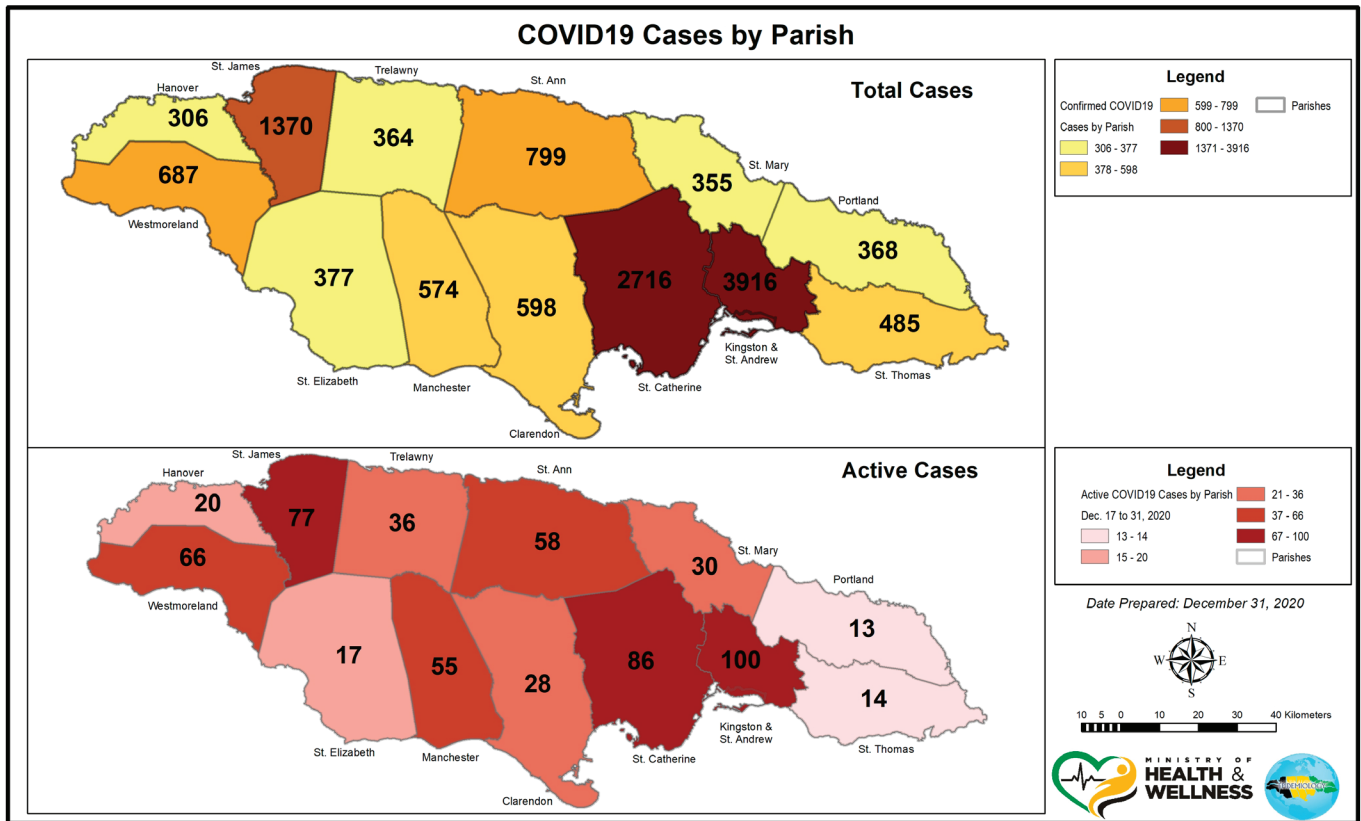
APPENDIX 3B: COVID-19 MONITORING DASHBOARD



APPENDIX 3C: GROUND TRUTHING PROGRESS ON THE PROPOSED COCKPIT COUNTRY PROTECTED AREA



APPENDIX 23D: CONFIRMED AND ACTIVE COVID-19 CASES AND RATES BY PARISH AS AT DECEMBER 31, 2020



LIST OF TABLES

Chapter 1: International Economy

- 1.1a: Annual Per Cent Change in Global Output, 2016–2021
- 1.1b: Annual Per Cent Change in Global Trade, 2016–2021
- 1.2: Annual Average Per Cent Change in Consumer Prices, 2016–2021
- 1.3: Unemployment Rate for Advanced Economies, 2016–2020
- 1.4: Selected Commodity Price Data, 2016–2020 (US\$)
- 1.5: Global Foreign Direct Investment Inflows, 2016–2020 (US\$ Billion)

Chapter 2: Official Development Assistance

- 2.1: Sources of New Official Development Assistance, 2016–2020 (US\$ Million)
- 2.2: Summary of 2020 Official Development Assistance (US\$ Million)
- 2.3: Net Flows, 2020 (US\$ Million)
- 2.4: Newly Approved IDB Grant Projects, 2020
- 2.5: Disbursements for Covid-19 Response under the Canada Funds for Local Initiatives, 2020
- 2.6: Scholarships & Training Awarded Through ODA (US\$), 2020
- 2.7: Personnel Assigned to Jamaica by Organizations and Focal Areas, 2020

Chapter 3: Sustainable Development

- 3.1: Selected Sustainable Development Indicators, 2016–2020
- 3.2: Budgetary Allocations for Selected Environmental Management and Related Programmes, FY2019/20–2020/21
- 3.3: Drought Indices by Parish, 2020
- 3.4: Coral Reef Health Index by Parish, 2020
- 3.5: Beach Width Across Eight Parishes, 2019–2020

- 3.6: Indicators of Marine Water Quality
- 3.7: Volume of Waste Collected By Wasteshed, 2019–2020
- 3.8: Top Ten Items Collected at the Annual Coastal Clean-Up Day, 2020
- 3.9: Development Applications Received and Processed, 2019–2020
- 3.10: Development Applications Received and Processed, 2020
- 3.11: Enforcement Actions for the Period 2018–2020
- 3.12: Number of Genuine Fire Calls, 2019–2020
- 3.13: Impact of Fire, 2018–2020
- 3.14: Classification of Fires, 2019–2020
- 3.15: Selected GIS Growth and Development Indicators, 2019–2020
- 3.16: Ela Training Sessions and Number of Participants, 2019

Chapter 4: Science, Technology and Innovation

- 4.1: Budgetary Allocations for Selected STI Programmes and Agencies (\$000)
- 4.2: Student Performance in Mathematics and Science in the PEP Grade 5 Assessments, 2020
- 4.3: Selected STI Capacity Building Activities – Training, 2020
- 4.4: Teledensity (Per 100 Individuals) in Jamaica, 2016–2020
- 4.5: Volume and Value of ABM and Point of Sale Transactions Processed by Commercial Banks for January to December, 2017–2020
- 4.6: Ranking of Selected Countries in the Global Innovation Index, 2016–2020
- 4.7: Patent Applications to the Jamaica Intellectual Property Office, 2016–2020

Chapter 5: Gross Domestic Product

- 5.1: Value Added By Industry at Constant (2007) Prices, 2016–2020
- 5.2: Year over Year Change of Gross Value Added By Industry at Constant (2007) Prices, 2016–2020
- 5.3: Contribution to Gross Value Added In Basic Values at Constant (2007) Prices, 2016–2020
- 5.4: Contribution to Total Goods and Services Production, 2016–2020
- 5.5: Value Added By Industry at Current Prices, 2016–2020

Chapter 6: Balance of Payments and External Trade

- 6.1: Balance of Payments Accounts 2019, 2020 (US \$Million)
- 6.2: Merchandise Trade by SITC Section, 2019, 2020 (US\$ Million)
- 6.3: Imports by Economic Function, 2019, 2020 (US\$ Million)
- 6.4: Traditional & Non-Traditional Exports, 2019–2020 (US\$ '000)
- 6.5: Merchandise Trade with CARICOM by SITC Section, 2019, 2020 (US\$ '000)
- 6.6: Jamaica's Remittance Inflows 2019, 2020 (US\$ Million)

Chapter 7: Money and Inflation

- 7.1: Interest Rates on BOJ Certificate of Deposits and GOJ Instruments, 2016–2020
- 7.2: Summary of the Monetary Authority's Accounts, December 2018 – December 2020
- 7.3: Inflation, April–December 2020

Chapter 8: Fiscal Accounts

- 8.1a: Summary of Central Government Fiscal Operations, FY2016/17 to FY2020/21
- 8.1b: Summary of Central Government Fiscal Operations, Apr–Dec 2016–2020
- 8.2: Functional Classification of Recurrent and Capital Expenditure FY2016/17 to FY2020/21
- 8.3a: Tax Revenue Collections, FY2016/17 to FY2020/21
- 8.3b: Tax Revenue Collections, Apr–Dec 2016–2020

Chapter 9: Finance & Insurance Services Industry

- 9.1: Assets and Liabilities of the Bank of Jamaica at December, 2019–2020 (J\$ '000)
- 9.2: Institutions in the Jamaican Financial System, 2015–2019
- 9.3: Select Key Indicators of Deposit-Taking Institutions Performance, 2016–2020
- 9.4: Assets of Commercial Banks, December 2016–2020 (J\$ '000)
- 9.5: Commercial Banks Loans and Advances, 2016–2020 (J\$000)
- 9.6: Assets of Institutions Licensed Under the Financial Institutions Act, December 2016–2020
- 9.7: Loans & Advances Outstanding to Licensees under the Financial Institutions Act, December, 2016–2020 (\$Million)
- 9.8: Assets of Building Societies, 2016–2020
- 9.9: Commercial Banks' Weighted Average Monthly Loan Rates, 2018–2019 (Per Cent)
- 9.10: Commercial Banks Monthly Weighted Average Deposit Interest Rates, 2019–2020
- 9.11: Performance Indicators for the Life Insurance Industry, 2015–2019 (\$Million)
- 9.12: Performance Indicators for the General Insurance Industry, 2015–2019 (\$Million)

Chapter 10: Agriculture

- 10.1: Agriculture Production Index, 2010–2020, Base Year = 2007
- 10.2: Value of Traditional Exports, 2016–2020
- 10.3: Production Statistics: Sugar Cane And Derivatives, 2016–2020
- 10.4: Sugar Exports by Destination, 2016 – 2020
- 10.5: Production of Selected Traditional Export Crops, 2016–2020
- 10.6: Farmgate Prices Of Selected Traditional Export Crops, 2016–2020
- 10.7: Domestic Crop Production, 2016–2020
- 10.8: Domestic Farmgate Price Index, 2016–2020
- 10.9: Livestock Production, 2016–2020
- 10.10: Development Bank Of Jamaica: Loan Allocation to the Agriculture Industry: 2016–2020
- 10.11: Interest Rates Applied To Agricultural Loans – 2020
- 10.12: Agricultural Credit, 2016–2020

Chapter 11: Mining and Quarrying

- 11.1: Jamaica Bauxite/Alumina Production and Exports, 2016–2020 ('000 Tonnes)
- 11.2: Selected Costs of Production per Unit of Alumina Production in the Bauxite/Alumina Sub-Industry, 2016–2020 (US\$/Metric Tonne)
- 11.3: Total Value of Exports & Foreign Exchange Earnings 2016–2020 (US\$ Million)
- 11.4: Production of Industrial Minerals 2016–2020 ('000 Tonnes)

Chapter 12: Manufacture

- 12.1: Output of Selected Manufactured Commodities, 2016–2020
- 12.2: Total Exports from the Manufacturing Industry, 2016–2020 (US\$000)
- 12.3: Outstanding Loans and Advances to the Manufacturing Industry by Commercial Banks, 2016–2020 (\$'000)
- 12.4: Change in Sales for Manufactured Goods 2019, 2020 (\$Millions)

Chapter 13: Micro and Small Enterprises

- 13.1: Number of MSMEs Using to GCT Returns, 2018–2020
- 13.2: Real Gross Sales for MSMES Using GCT Returns, 2018–2020 (\$ Million)
- 13.3: Disbursements by Wholesale Agencies, 2016–2020 (\$Million)
- 13.4: Disbursements by Select Retail Lending Agencies, 2016–2020 (\$Million)
- 13.5: JNSBL Loan Disbursement, 2016–2020

Chapter 14: Construction

- 14.1: Major Performance Indicators of the Construction Industry, 2016–2020
- 14.2: Capital Expenditure by Institution (\$'Million)
- 14.3: Growth in Gross Sales of Construction Inputs, January–December 2020 Relative to January–December 2019
- 14.4: Mortgages by Major Agencies, 2016–2020 (\$ Million)

Chapter 15: Energy, Electricity and Water

- 15.1: World Oil Demand 2016–2020
- 15.2: World Oil Supply 2016–2020
- 15.3: Average Billing Prices for Selected Petroleum Products, 2016–2020
- 15.4a: Volume and Value of Crude Oil Imports 2018–2020
- 15.4b: Volume and Value of Petroleum Products Imports 2018–2020
- 15.5: Jamaica's Total Energy Consumption 2016–2020
- 15.6: Petroleum Consumption by Activity 2016–2020
- 15.7: Petroleum Consumption by Product 2016–2020
- 15.8: JPS Generating Capacity, Output, Heat Rate, Fuel Consumption 2016–2020
- 15.9: JPS Sales & Revenue 2016–2020
- 15.10: JPS Average Number of Customers, Kwh Used, Rates Charged 2016–2020
- 15.11: Water Projects 2020
- 15.12: Data on Domestic 2016–2020

Chapter 16: Transportation, Storage and Communication

- 16.1: Taxi Service: Licence Issued, 2016–2020
- 16.2: Ports: Ship Traffic & Cargo Flow, 2016–2020
- 16.3: International Airports: Movements Of Aircraft, Passengers, Cargo And Mail, 2019–2020
- 16.4: Number of Telecom Licence Granted, 2016–2020
- 16.5: Telephone Subscribers by Categories 2016–2020 Number of Lines
- 16.6: Post and Telecommunications Department Operating and Financial Data 2016–2020

Chapter 17: Hotels & Restaurants

- 17.1: Tourism Performance Indicators, 2016–2020
- 17.2: Stopover Arrivals to Jamaica by Source Market, 2016–2020
- 17.3: Stopover Arrivals to the Caribbean, 2020
- 17.4: Cruise Passenger Arrivals to the Caribbean, 2020

Chapter 18: Entertainment and Sports

- 18.1: Percentage Change in Real Gross Sales by Entertainment Category 2020/2019
- 18.2: Selected Indicators from Palace Amusement Company Revenues, 2018/2019 & 2019/2020 (\$Million)
- 18.3: Nature & Total Number of Contacts Made to the Broadcasting Commission 2020, 2019
- 18.4: Amusement Licences Granted & Revenue Collected 2019-2020
- 18.5: Payment of Royalties Disbursed By JACAP, 2018-2020 (\$Million)
- 18.6: Projects Funded By SDF 2016-2020 (\$Million)
- 18.7: Sports Development Foundation Distribution of Grants, 2019-2020 (\$Million)
- 18.8: Jamaica Athletics Administrative Association Income, 2015/2016-2019/2020 (J\$ '000)
- 18.9: Jamaica Athletics Administrative Association Expenditure, 2015-2020 (J\$'000)

Chapter 19: Wholesale & Retail Trade; Repair and Installation of Machinery

- 19.1: Cases Investigated and Completed by the FTC, 2019–2020
- 19.2: Consumer Affairs Commission Performance Indicators, 2016–2020
- 19.3: Output and Employment Trends in Distribution, 2016–2020
- 19.4: Growth in Gross Sales in Wholesales & Retail Trade; Repairs & Installation of Machinery, 2019–2020
- 19.5: Loans & Advances Outstanding to Firms in WRTRIM and to Consumers, 2016–2020 (\$ Million)

Chapter 20: Population

- 20.1: Population Growth Statistics, 2006–2020
- 20.2: Population of Jamaica by Age and Sex, End of Year, 2016–2020
- 20.3a: Distribution of Women in Reproductive Ages (15–49) Estimates, 2016–2020
- 20.3b: Distribution of Commodities by Type, 2016–2020
- 20.3c: Utilization and Coverage of Public Sector Family Planning Services, 2016–2020
- 20.4: End of Year Population of Jamaica by Parish, 2015–2019

- 20.5a: Main Destinations of Migration from Jamaica, 2009–2019
- 20.5b: Jamaican Immigrants Admitted to the United States of America by Selected Class of Admission, 2015–2019
- 20.5c: Permanent Residents Admitted from Jamaica to Canada by Age, 2015–2019
- 20.5d: Permanent Residents from Jamaica to Canada by Occupation, 2015–2019
- 20.5e: Temporary Workers from Jamaica to Canada by Occupation, 2015–2019
- 20.5f: Jamaicans Receiving British Citizenship by Type, 2015–2019
- 20.5g: Jamaican Returned Residents and Involuntary Returned Migrants, 2016–2020
- 20.5h: Immigration to Jamaica, 2016–2020
- 20.5i: Distribution of Aliens Who Requested Extension of Stay beyond Six Months, 2016–2020
- 20.5j: Approved Applications of CSME Certificates for Jamaicans by Sex, 2013-2020

Chapter 21: The Labour Market

- 21.1: Main Labour Force Indicators by Sex, 2019–2020 ('000)
- 21.2: Labour Force by Age Group and Sex, 2019–2020 ('000)
- 21.3: Employed Labour Force by Age Group and Sex, 2019–2020 ('000)
- 21.4: Employed Labour Force by Employment Status, 2019–2020 ('000)
- 21.5: Employed Labour Force by Industry, 2019–2020 ('000)
- 21.6: Unemployment by Major Demographic Groups, 2019–2020 ('000)
- 21.7: Jamaicans Employed in North America under the Overseas Employment Programme by Sex and Type of Employment, 2019–2020
- 21.8a: Growth in Selected Total Economy Indicators, 2015–2019
- 21.8b: Labour Productivity Growth Rates by Industry, 2015–2019

Chapter 22: Education

- 22.1a: Estimates of Expenditure by Function and Programmes, 2019/20–2020/2021
- 22.1b: Ministry of Education per Capita Expenditure by Educational Level, 2017/2018–2019/2020 (\$ Current Prices)
- 22.2: Students' Loan Bureau Grants by Institution, 2019/2020
- 22.3: Enrolment in Early Childhood Education by School Type and Year, 2015/16–2019/2020
- 22.4: Primary Level Student Enrolment by Type of School, 2016/17–2019/2020
- 22.5a: Primary Exit Profile Statistical Summaries, 2018/19 and 2019/2020
- 22.5b: Student Achievement in the Various Subject Areas, 2019/2020
- 22.6: Secondary Level Student Enrolment by School Type, 2017/2018–2019/2020
- 22.7: Performance of Public Secondary School Students at the General and Technical Proficiency Levels Technical Proficiency Levels, Caribbean Secondary Education Certificate Examination, 2016–2020
- 22.8: Distribution of Enrolment at the Tertiary Level (2019/2020)
- 22.9: Enrolment and Output of Skilled and Semi-Skilled Manpower from Non-Formal Human Development and Resource Training/ National Training Agency Programmes, 2018/19–2019/2020
- 22.10: Two Year Enrolment and Certification by Training Provider, 2018/19–2019/2020

Chapter 23: Health

- 23.1a: National Expenditure on Health (J\$), 2009–2018
- 23.1b: Ministry of Health and Wellness and its Departments Recurrent and Capital Budgets by Programme, 2019/20–2020/21
- 23.1c: Ministry of Health Recurrent Budget for 2020/2021 ('000)
- 23.2: Deaths of the Population Five Years and over by Sex and Cause
- 23.3: Patients seen in Accident & Emergency Units of Public Hospitals by Discharged Diagnosis Condition, Sex and Age, 2020
- 23.4: Number and Utilization of Public Health Facilities, 2020

- 23.5: Pharmacy Services at Public Hospitals by Region, 2020

Chapter 24: National Security and Justice

- 24.1A: Ministry of National Security Recurrent and Capital Budget by Function, 2019/20–2020/21
- 24.1B: Ministry of Justice Recurrent and Capital Budget by Function, 2019/20–2020/21
- 24.2: Establishment and Strength of the Jamaica Constabulary Force as at December 31, 2020
- 24.3: Total Crimes Reported and Cleared up, 2016–2020
- 24.4: Category 1 Crimes by Parish, 2019 vs 2020
- 24.5: Age Group and Sex of Persons Arrested for Category 1 Crimes, 2020
- 24.6: Age Group and Sex of Victims for Category 1 Crimes, 2020
- 24.7: Number of Persons deported to Jamaica by types of Crimes and Country, 2019 and 2020
- 24.8: Reported Road Accidents involving Fatalities by Parish, 2019 and 2020
- 24.9: Age Group and Sex of road users who died in Traffic Accidents, 2019 and 2020
- 24.10: Total Admissions to Adult Correctional Institutions by Offence, Age and Sex, 2020
- 24.11: Total Admissions to Adult Correctional Centres by Age, 2020
- 24.12: Population figures of Juvenile Institutions as at December 31, 2020
- 24.13: Admission to Juvenile Institutions by Age, Sex and Offence, 2020
- 24.14: Reasons Juvenile appeared before the Court, 2018–2020
- 24.15: Persons Seeking Assistance, 2016–2020
- 24.16: Parish Courts Case Statistics, 2020

Chapter 25: Social Development, Social Protection and Culture

- 25.1: Social Development, Social Protection and Culture, Recurrent and Capital Budget by Programme 2019/20–2020/21 (\$'000)
- 25.2: Reports Received at the National Children's Registry by Category January–December, 2020
- 25.3: Population of Children in Government Institutions as at December 2020
- 25.4: Population of Children in Care by Region and Placement Category for Quarter Ending December 31, 2020

25.5:	Youth Enrolment and Certification by Sex and Region, April 2019–March 2020	25.8C:	Expenditure of Additional Cash Grants, by Benefit Level and Recipients, December 2020
25.6:	National Council for Senior Citizens, Referrals, 2020	25.9:	Beneficiaries of Public Assistance by Programme and Parish, 2020
25.7:	Jamaica Social Investment Fund, Status of Projects, 2020 (value and cost in \$Million	25.10:	National Insurance Pensions Paid, Number of Beneficiaries, 2020
25.8A:	PATH Beneficiaries by Parish and Category, Registered, December 2020	25.11:	National Insurance Fund Income and Expenditure, 2019 & 2020 (unaudited statements) J\$ Million
25.6B:	PATH Beneficiaries by Parish and Category, Paid, December 2020	25.12:	CHASE Fund, 2020

LIST OF FIGURES

Chapter 1: International Economy

- 1A: Cumulative Global Covid-19 Cases, 2020
- 2A: Monthly Average Spot Peak Price of Crude Oil, December 2019–December 2020

Chapter 2: Official Development Assistance

- 2A: New & Ongoing ODA by Source, 2020
- 2B: Largest Cooperation Programme by Source, 2020
- 2C: Total New ODA, 2016–2020
- 2D: Alignment of New ODA with the National Goals, 2020
- 2E: Sectoral Allocation of New ODA, 2020
- 2F: Disbursements by International Development Partners, 2020
- 2G: Sectoral Allocation for the CDB Portfolio, 2020
- 2H: Sectoral Allocation for the EU Cooperation Programme, 2020
- 2I: Sectoral Allocation of the IDB Cooperation Programme, 2020
- 2J: Sectoral Allocation of the People's Republic of China's Cooperation Programme, 2020

Chapter 3: Sustainable Development

- 3A: Atmospheric Concentrations of CO₂, 2011–2020
- 3B: Average Annual Rainfall 2010–2020
- 3C: Mean Rainfall by Parish Relative to the 30-Year Mean, 2020
- 3D: Average Annual Temperature at the NMIA and SIA, 2010–2019
- 3E: Correlation of Bush Fires and Rainfall, 2016–2020
- 3F: Distribution of Entities by Per Cent of Datasets with Complete and Up-To-Date Metadata
- 3G: Distribution of Entities by Per Cent of it Budget Assigned to GIS Software, Hardware and Maintenance
- 3H: Snapshot of the NSPIT Metadata Portal

Chapter 5: Gross Domestic Product

- 5a: Real GDP for the Jamaican Economy, 2011–2020

Chapter 6: Balance of Payments and External Trade

- 6A: Current Account Deficit, 2011–2020 (US\$ Million)
- 6B: Stock of Net International Reserves, US\$ Million, 2011–2020
- 6C: Growth in Merchandise Exports and Imports (%) 2011–2020
- 6D: Annual Remittance Inflows & Outflows, 2011–2020
- 6E: Daily Nominal Daily Exchange Rates (US\$ Selling Rate), 2020

Chapter 7: Money and Inflation

- 7A: Movements in Indicative Interest Rates 2020
- 7B: 12 Monthly Point-To-Point Inflation, 2020
- 7C: Nominal Exchange Rate Movements (USD/JMD) 2019–2020

Chapter 8: Fiscal Accounts

- 8A: Expenditure (above-the-line), Revenue & Grants and Fiscal Surplus/Deficit for April–December, 2011–2020
- 8B: Budgetary Allocation FY2020/21
- 8C: Annual Debt-To-GDP Ratio, 2011–2020

Chapter 9: Finance & Insurance Services Industry

- 9A: Real Value Added Growth Rate for Finance & Insurance Services
- 9B: Non-Performing Loans to Total Loans Ratio (System Total), 2011–2020

Chapter 10: Agriculture

- 10A: Real Value Added Growth Rate for Agriculture, Forestry & Fishing, 2011–2020

Chapter 11: Mining and Quarrying

- 11A: Real Value Added For Mining & Quarrying 2011–2020
- 11B: Bauxite Capacity Utilization Rate 2011–2020
- 11C: Alumina Capacity Utilization Rate 2011–2020
- 11D: Jamaica's Alumina Production Market Share 2011–2020
- 11E: Employed Labour Force in the Mining & Quarrying Industry, 2011–2020

Chapter 12: Manufacturing

- 12A: Change in Real Value Added for the Manufacturing Industry, 2010–2020
- 12B: Employed Labour Force in the Manufacturing Industry, 2016–2020

Chapter 13: Micro and Small Enterprises

- 13A: Employed Own Account Worker, 2010–2020
- 13B: JNSBL Loan Disbursement by Type of Economic Activity, 2020
- 13C: JNSBL Loan Portfolio by Parish, 2020

Chapter 14: Construction

- 14A: Real Value Added Growth Rates For the Construction Industry

Chapter 15: Energy, Electricity and Water

- 15B: Change in Real Value Added for the Electricity and Water Supply Industry, 2011–2020
- 15B: Monthly Average Spot Peak Price Movements for Crude Oil, 2019 and 2020

- 15C: Change in Electricity Consumption by Parish Relative to 2019
- 15D: Change in Water Consumption by Parish in 2020 Relative to 2019
- 15E: Non-Revenue Water as a Per Cent of Total Production, 2009–2020

Chapter 16: Transportation, Storage and Communication

- 16A: Real Value Added Growth Rates for the Transport, Storage & Communication Industry, 2011–2020

Chapter 17: Hotels & Restaurants

- 17A: Percentage Change in Real Value Added for Hotels & Restaurants, 2011–2020
- 17B: Total Visitor Arrivals by Month, 2018–2020
- 17C: Purpose of Visit by Foreign Nationals, 2020
- 17D: Purpose of Visit by Non-Resident Jamaicans, 2020
- 17E: Share of Stopover Arrivals by Source Market, 2020
- 17F: Cruise Passenger Arrivals by Month, 2018–2020
- 17G: Stopover Expenditure, 2011–2020
- 17H: Cruise Passenger Expenditure, 2011–2020
- 17I: Share of Tourist Arrivals by Region, 2020

Chapter 18: Entertainment and Sports

- 18A: Percentage Change in Real Value Added For Recreational, Cultural and Sporting Activities, 2010–2019
- 18B: Share of Recreational, Cultural & Sports Activities in Total Real Value Added, 2010–2019
- 18C: Notices of Breach Issued to Licence Operators by the BCJ, 2018–2020
- 18D: Stock of Loans and Advances to the Entertainment Industry, 2016–2020

Chapter 19: Wholesale & Retail Trade; Repair and Installation of Machinery

- 19A: Real Value Added Growth Rates of Wholesale & Retail Trade; Repair and Installation of Machinery Industry, 2011–2020

- 19B: Complaints Received by the CAC by Category, 2020
- 19C: Share of Total Sales by Firms Filing GCT Returns in the Wholesale & Retail Trade; Repair and Installation of Machinery Industry, 2018–2020
- 19D: Share by Firms Filing GCT Returns in the Wholesale & Retail Trade; Repair and Installation of Machinery Industry, 2018–2020

Chapter 20: Population

- 20A: Per Cent Distribution of Population by Age and Sex for 2020 and Projections for 2030
- 20B: Total Fertility Rates in Jamaica, 1973–2008
- 20C: Categories of Admission

Chapter 22: Education

- 22A: Enrolment by Education Level (3–24 Years) 2019/2020
- 22B: Capital Expenditure (Multilateral/Bilateral Programmes) FY 2019/2020

Chapter 23: Health

- 23A: Deaths Occurring by Health Regions 2019, 2020
- 23B: Leading Causes of Deaths among Jamaicans, 2018

- 23 C: Births occurring by Health Regions 2019, 2020
- 23D: Total Hospital Admissions 2019 and 2020
- 23E: Total Admissions by Type of Hospital 2019 and 2020
- 23F: Total Admissions by Public Hospital Specialty, 2020
- 23G: Total Clinic Visits 2019, 2020
- 23 H: Specialist Clinics Visits in Primary Care 2019 and 2020
- 23 I: Hospital Admissions by Regions 2019 and 2020
- 23 J: Visits for patients with Hypertension, Diabetes or Both, 2020
- 23 K: Chronic Disease Visits to Health Centres by Gender, 2020

Chapter 24: National Security and Justice

- 24A: Percentage Distribution of Category 1 Crimes by Parish, 2020
- 24B: Percentage Distribution of Type of Implement Used in Murder, 2020
- 24C: Occupational Status of New Admissions to Correctional Centres, 2020
- 24D: Length of Sentence, 2020

ABBREVIATIONS AND ACRONYMS

A&E	: Accident and Emergency		Elections
ABC	: Agribusiness Council	CALP	: Caribbean Anti-Money Laundering Programme
ABIS	: Agricultural Business Information System	CAPE	: Caribbean Advanced Proficiency Examinations
AC (Bank)	: Agriculture Credit Bank	CAPI	: Computer-Assisted Personal Interviewing
ACIJ/JM	: African Caribbean Institute of Jamaica/ Jamaica Memory Bank	CARDI	: Caribbean Development Institute
ACOSTRAD	: Association for the Control of Sexually Transmitted Diseases	CAREC	: Caribbean Epidemiology Centre
ACP	: African, Caribbean and Pacific States	CARICOM	: Caribbean Community
ACTI	: Association of Caribbean Tertiary Institutions	CARIMAC	: Caribbean Institute of Mass Communication
ADR	: Age Dependency Ratio	CASE	: College of Agriculture, Science and Education
AEC	: Adult Education Centre	CBI	: Caribbean Basin Initiative
AES	: Alternative Energy Sources	CBMD	: Central Business and Markets Districts
AFI	: Approved Financial Institutions	CBR	: Crude Birth Rate
AIDS	: Acquired Immunodeficiency Syndrome	CBTPA	: Caribbean Basin Trade Partners
ARIP	: Airport Reform and Improvement Project	CCCJ	: Council of Community Colleges of Jamaica
ARV	: Antiretrovirals	CCDC	: Caribbean Child Development Centre
ASFR	: Age Specific Fertility Rate	CCF	: Country Cooperation Framework
ASSP	: Agriculture Support Services Project	CCGEP	: Canadian/Caribbean Gender Equality Programme
BGA	: Bureau of Gender Affairs	CCJ	: Caribbean Court of Justice
BNTF	: Basic Needs Trust Fund	CCP	: Children's Code for Programming
BIS	: Beneficiary Identification System	CCRC	: Community Conflict Resolution Councils
BITU	: Bustamante Industrial Trade Union	CDB	: Caribbean Development Bank
BNTF	: Basic Needs Trust Fund	CDC	: Community Development Committee
BOJ	: Bank of Jamaica	CDF	: Community Development Fund
BOS	: Board of Supervision	CDR	: Crude Death Rate
BPO	: Business Process Outsourcing	CD	: Compact Disc
BRS	: Bodles Research Station	CEADIR	: Climate Economic Analysis for Development, Investment, and Resilience
BSJ	: Bureau of Standards, Jamaica	CEF	: Credit Enhancement Fund
BSP	: Banana Support Programme	CEF	: Caribbean Enterprise Fora
BST	: Biodigester Septic Tank	CEIS	: Caribbean Energy Information Systems
BWA	: Bureau of Women's Affairs	CELAC	: Community of Latin America and Caribbean States
BYOND	: Building Youth for National Development	CEO	: Chief Executive Officer
CAA	: Civil Aviation Authority	CES	: Community Engagement Series
CABA	: Caribbean Agribusiness Association		
CAC	: Consumer Affairs Commission		
CAC	: Community Action Committees		
CAFFE	: Citizen's Action for Free and Fair		

CET	: Common External Tariff		Project
CFCs	: Chlorofluorocarbons	CSJP	: Citizens' Security and Justice Programme
CFNI	: Caribbean Food and Nutrition Institute	CSME	: CARICOM Single Market and Economy
CFTC	: Commonwealth Fund for Technical Cooperation	CSO	: Community Service Organisation
CGC	: Child Guidance Clinic	CSS	: Country Support Strategy
CHASE	: Culture, Health, Arts, Sports and Education	CSS	: Cost Sharing Scheme
CIBC	: Canadian Imperial Bank of Commerce	CTC	: Culture Training Centre
CIDA	: Canadian International Development Agency	CTOs	: Caribbean Tourism Organizations
CIEP	: Culture in Education Programme	CWIP	: Coastal Water Improvement Project
CIM	: Centre for International Migration	CXC	: Caribbean Examination Council
CIMIS	: Computerized Integrated Management Information System	DBJ	: Development Bank of Jamaica
CIP	: Community Investment Project	DC	: Domestic Carriers
CIS	: Commonwealth of Independent States	DCS	: Department of Correctional Services
CISOCA	: Centre for Investigation of Sexual Offences and Child Abuse	DDA	: Doha Development Agenda
CIT	: Caribbean Institute of Technology	DFATD	: Department for Foreign Aid and International Trade
CLEAR II	: Country Level Engagement and Assistance to Reduce Child Labour project	DFID	: Department for International Development
CLMIS	: Caribbean Labour Market Information System	DMU	: Dual Method Use
CMC	: Commercial Motor Carrier	DOL	: Development Options Limited
CMR	: Continuous Machine Rating	DPP	: Department of Public Prosecution
CNCD	: Chronic Non-Communicable Disease	DRF	: Disputes Resolution Foundation
COMEX	: Commodity Exchange	DRM	: Disaster Risk Management
COSPROD	: Correctional Services Production Company	DSB	: Dispute Settlement Body
COVID-19	: Coronavirus disease 2019	DSP	: Data Service Provider
CPFSA	: Child Protection and Family Services Agency	DVSP	: Domestic Voice Service Provider
CPI	: Consumer Price Index	E-MFOs	: Emerging Micro-Finance Organizations
CPP	: Community Priority Plan	EAC	: Electoral Advisory Committee
CPR	: Cardiopulmonary Resuscitation	ECC	: Early Childhood Commission
CRC	: Convention on the Rights of the Child	ECD	: Early Childhood Development
CROSQ	: Caribbean Regional Organization for Standards and Quality	ECE	: Early Childhood Education
CRR	: Centre for Reparation Research	ECEP	: Early Childhood Education Programme
CRU	: Commodity Research Unit	ECFMS	: Electronic Case Flow Management System
CSD	: Children's Service Division	ECG	: Electrocardiogram
CSE	: Comprehensive Sexuality Education	ECI	: Early Childhood Institution
CSEC	: Caribbean Secondary Education Certificate	ECLAC	: Economic Commission for Latin America and the Caribbean
CSEP	: Community Service Enhancement	ECSP	: Enhancing Civil Society Project
		ECU	: European Currency Unit
		EDF	: Export Development Fund
		EEC	: European Economic Community
		EEZ	: Exclusive Economic Zone
		EFJ	: Environmental Foundation of Jamaica

EIDHR	: European Instrument for Democracy and Human Rights	GMDAC	: Global Migration Data Analysis Centre
EKACDM	: Enhancing Knowledge and Application of Comprehensive Disaster Management	GMG	: Global Migration Group
ELE	: Electronic Labour Exchange	GOJ	: Government of Jamaica
EMEP	: Energy Management and Efficiency Programme	GPRS	: General Packet Radio Service
EMIS	: Energy Management Information System	GSM	: Global Systems for Mobile
EMU	: European Monetary Union	GVS	: The German Volunteer Service
EnCC	: Environment and Climate Change	GWEP	: Graduate Work Experience Programme
ENHR	: Essential National Health Research	GWIS	: Ground Water Information System
EOJ	: Electoral Office of Jamaica	HACCP	: Harvard Analysis Critical Control Point
EPA	: Economic Partnership Agreement	HEART	: Human Employment and Resource Training
ERS	: Emergency Relief Services	HFLE	: Health and Family Life Education
ESP	: Early Stimulation Programme	HIA	: Hotel Incentives Act
EU	: European Union	HISEP	: High School Equivalency Programme
EUPRP IV	: European Union Poverty Reduction Programme IV	HIV	: Human Immunodeficiency Virus
EXIM (Bank)	: Export/Import	HOPE	: Housing, Opportunity, Production and Employment
FA	: Financing Agreement	HPP	: Health Promotion Protection
FAMPLAN	: Jamaica Family Planning Association	HPV	: Human Papillomavirus
FAO	: Food and Agriculture Organization	HSD	: Health Service Delivery
FCJ	: Factories Corporation of Jamaica Limited	IAEA	: International Atomic Energy Agency
FIA	: Financial Institutions Act	IABIN	: Inter-American Biodiversity Information Network
FINSAC	: Financial Sector Adjustment Company	IAEACRP	: International Atomic Energy
Forex	: Foreign Exchange	IAN	: Inter-Agency Network
FSP	: Food Stamp Programme	IBRD	: International Bank for Reconstruction and Development
FTAA	: Free Trade Area of the Americas	ICAS	: Industrial Chemistry and Analytical Services
FTC	: Fair Trading Commission	ICENS	: International Centre for Environmental and Nuclear Sciences
FTI	: Food Technology Institute	ICPD	: International Conference on Population and Development
FTZC	: Free Trade Zone Carriers	ICOMOS	: International Council for Sites and Monuments
FTZSO	: Free Trade Zone Service Provider	ICRP	: Inner-City Renewal Programme
FY	: Fiscal Year	ICT	: Information Communication and Technology
GAC	: Gender Advisory Council	IDB	: Inter-American Development Bank
GATT	: General Agreement on Tariffs and Trade	IDEVAW	: International Day for the Elimination of Violence Against Women
GBV	: Gender-based Violence	IDPs	: International Development Partners
GCF	: Green Climate Fund	IDRC	: International Development Research Centre
GCT	: General Consumption Tax	IDT	: Industrial Disputes Tribunal
GDP	: Gross Domestic Product	IDU	: Industrial Development Unit
GEF	: Global Environment Facility		
GFMD	: Global Forum on Migration and Development		
GFR	: General Fertility Rate		
GIS	: Geographic Information System		

IEC	: Information Education and Communication	JAMAL	: Jamaica Movement for the Advancement of Literacy
IFAD	: International Fund for Agricultural Development	JAMALCO	: Jamaica Aluminum Company
IGDS	: Institute for Gender and Development Studies	JAMPRO	: Jamaica Promotions Limited
IJCHR	: Independent Council for Human Rights	JBDC	: Jamaica Business Development Corporation
IICA	: Inter-American Institute for Co-operation on Agriculture	JBDC	: Jamaica Building Development Centre
IICD	: International Institute for Communication and Development	JBI	: Jamaica Bauxite Institute
ILO	: International Labour Organization	JBIC	: Japan Bank for International Cooperation
ILS	: Instrument Landing System	JBTE	: Joint Board of Teacher Education
IMD	: International Migration and Development	JCC	: Jamaica Chamber of Commerce
IMD	: International Men's Day	JCCCP	: Japan-Caribbean Climate Change Partnership
IMR	: Infant Mortality Rate	JCCP	: The Jamaica Cluster Competitiveness Project
IMS	: Institute of Management Sciences	JCDC	: Jamaica Cultural Development Commission
INQAAHE	: International Network of Quality Assurance Agencies in Higher Education	JCF	: Jamaica Constabulary Force
INSPORTS	: Institute of Sports	JCH	: Jamaica Council for the Handicapped
INTEC	: Information Communications and Technology	JCPD	: Jamaica Council for Persons with Disabilities
IOIA	: Independent Organic Inspectors Association	JCRC	: Jamaica Coalition on the Rights of the Child
IOJ	: Institute of Jamaica	JCTE	: Joint Committee for Tertiary Education
IPEC	: International Programme for the Elimination of Child Labour	JCTU	: Jamaica Confederation of Trade Unions
IRM	: Involuntary Returned Migrant	JDF	: Jamaica Defence Force
IS4H	: Information Systems for Health	JDIC	: Jamaica Deposit Insurance Corporation
ISCF	: Island Special Constabulary Force	JEA	: Jamaica Employer's Association
ISCO	: International Standard Classification Occupation	JEFE	: Competency-based Economies the Formation of Enterprises
ISP	: Internet Service Provider	JEU	: Justice Education Unit
IT	: Information Technology	JFB	: Jamaica Fire Brigade
IUCD	: Intrauterine Contraceptive Device	JFF	: Jamaica Football Federation
IVCC	: Venezuelan Institute for Culture and Cooperation	JFM	: Jamaica Federation of Musicians
JADEP	: Jamaica Drugs for the Elderly Programme	JFPA	: Jamaica Family Planning Association
JADF	: Jamaica Agriculture Development Foundation	JICA	: Japan International Cooperation Agency
Jafa	: Jamaica Association of Female Artists	JIM	: Jamaica Institute of Management
JAID	: Jamaican Association on Intellectual Disabilities	JIPO	: Jamaica Intellectual Property Office
		JISS	: Jamaica Injury Surveillance System
		JLC	: Jamaica Lottery Company
		JLS	: Jamaica Library Service
		JMA	: Jamaica Manufacturer's Association

JMB	: Jamaica Mortgage Bank		Advisory Committee
JMI	: Jamaica Maritime Institute	LNG	: Liquefied Natural Gas
JNHT	: Jamaica National Heritage Trust	LPG	: Liquid Petroleum Gas
JOCV	: Japan Overseas Cooperation Volunteers	LRS	: Local Registered Stock
JP	: Justice of the Peace	MRPA	: Mason River Protected Area
JPSCo	: Jamaica Public Service Company	MBJ	: Montego Bay, Jamaica
JRC	: Jamaica Railway Corporation	MBMR	: Montego Bay Metro Region
JRF	: Jamaica Redevelopment Foundation	MCGES	: Ministry of Culture, Gender, Entertainment and Sport
JRHS	: Jamaica Reproductive Health Survey	MCST	: Ministry of Commerce, Science and Technology
JSAS	: Jamaica School Administrative Software	M&E	: Monitoring and Evaluation
JSB	: Jamaica Society for the Blind	MEGJC	: Ministry of Economic Growth and Job Creation
JSE	: Jamaica Stock Exchange	MEFL	: Micro-Enterprise Financing Limited
JSF	: Jump Start Fund	MFAFT	: Ministry of Foreign Affairs and Foreign Trade
JSIF	: Jamaica Social Investment Fund	MFI	: Multilateral Financial Institutions
JSLC	: Jamaica Survey of Living Conditions	MFO	: Micro-Finance Organizations
JSOC	: Jamaica Standard Occupational Classification	MICAF	: Ministry of Industry, Commerce, Agriculture and Fisheries
JTAC	: Jones Town Area Council	MICIC	: Migrants in Countries of Crisis
JTAT	: Jamaica Trade Adjustment Team	MICT	: Ministry of Industry Commerce & Technology
JTB	: Jamaica Tourist Board	MIDA	: Micro Investment Development Agency
JTI	: Justice Training Institute	MIDP	: Major Infrastructure Development Programme
JUPP	: Jamaica Urban Poverty Project	MIF	: Multilateral Investment Fund
JUTS	: Jamaica Union of Tertiary Students	MIND	: Management Institute for National Development
JV	: Joint Venture	MLGRD	: Ministry of Local Government and Rural Development
JYBT	: Jamaica Youth Business Trust	MMGMM	: Marcus Mosiah Garvey Multimedia Museum
KAC	: Kaiser Aluminium Corporation	MLSS	: Ministry of Labour and Social Security
KAP	: Knowledge Attitudes and Practice	MMR	: Material Mortality Rate
KILM	: Key Indicators of the Labour Market	MNS	: Ministry of National Security
KJ/kWh	: Kilojoules per Kilowatt hours	MOA	: Ministry of Agriculture
KMA	: Kingston Metropolitan Area	MOEYI	: Ministry of Education, Youth and Information
KMR	: Kingston Metropolitan Region	MOHW	: Ministry of Health and Wellness
KSA	: Kingston and St. Andrew	MOJ	: Ministry of Justice
KSAC	: Kingston & St. Andrew Corporation	MOU	: Memorandum of Understanding
KV	: Kilovolts	MOWH	: Ministry of Water & Housing
KWh	: Kilowatt Hour	MP	: Members of Parliament
LARC	: Long-acting Reversible Contraceptives	MPIP	: Multi-sectoral Pre-investment Programme
LE	: Life Expectancy		
LEDSP	: Local Economic Development Support Programme		
LEI	: Local Economic Initiative		
LEGS	: Learn, Earn, Give, Save		
LFS	: Labour Force Survey		
LIFE	: Living in Family Environment		
LME	: London Metal Exchange		
LMIS	: Labour Market Information System		
LMITAC	: Labour Market Information Technical		

MPMU	: Missing Person Monitoring Unit	NIDS	: National Identification System
MRC	: Multimedia Resource Centre	NIP	: National Indicative Programme
MSBE	: Micro and Small Business Enterprise	NIR	: Net International Reserves
MSME	: Micro, Small and Medium Enterprise	NIF	: National Insurance Fund
MTC	: Multilateral Technical Cooperation	NIS	: National Insurance Scheme
MTF	: Medium Term Socio-Economic Policy Framework	NISP	: National Integrated HIV/SRH Strategic Plan
MVA	: Motor Vehicle Accident	NLA	: National Land Agency
NAC	: National AIDS Committee	NMIA	: Norman Manley International Airport
NAFTA	: North America Free Trade Area	NPA	: National Plan of Action
NAIRP	: National Road Improvement Projects	NPACC	: National Plan of Action Coordinating Committee
NAO	: National Authorising Officer	NPACV	: National Plan of Action for an Integrated Response to Children and Violence
NAO	: National Apprenticeship Programme	NPC	: National Planning Council
NCB	: National Commercial Bank	NPEP	: National Poverty Eradication Programme
NCDs	: Non-Communicable Diseases	NPGE	: National Policy for Gender Equality
NCDA	: National Council on Drug Abuse	NPI	: Natural Products Institute
NCE	: National Council on Education	NPP	: National Poverty Policy
NCR	: National Children's Registry	NPRP	: National Poverty Reduction Programme
NCSC	: National Council for Senior Citizens	NPSC	: National Parenting Support Commission
NCST	: National Commission on Science and Technology	NSCP	: National Service Corps Programme
NCTVET	: National Council on Technical and Vocational Education and Training	NSP	: National Strategic Plan for HIV
NCU	: Northern Caribbean University	NSSC	: National Secondary Students' Council
NCYD	: National Centre for Youth Development	NUYP	: National Unattached Youth Programme
NDA	: Net Domestic Assets	NVQ-J	: National Vocational Qualification of Jamaica
NDB	: National Development Bank	NWA	: National Works Agency
NDFJ	: National Development Foundation of Jamaica	NWC	: National Water Commission
NDRM	: Natural Disaster Risk Management	NWGIMD	: National Working Group on International Migration and Development
NEPA	: National Environment Planning Agency	NWU	: National Workers Union
NERHA	: North East Regional Health Authority	NYS	: National Youth Services
NET	: National Youth Services	NYCJ	: National Youth Council of Jamaica
NFDIC	: National Firearm and Drug Intelligence Centre	OAS	: Organization of American States
NFPB	: National Family Planning Board	OCA	: Office of the Children's Advocate
NGO	: Non-Governmental Organization	OCR	: Office of the Children's Registry
NGJ	: National Gallery of Jamaica	ODA	: Official Development Assistance
NHD	: Natural History Division	ODPEM	: Office of Disaster Preparedness and Emergency Management
NHDC	: National Housing Development Corporation	OECD	: Organization for Economic Co-operation and Development
NHF	: National Health Fund		
NHIP	: National Health Insurance Plan		
NHT	: National Housing Trust		
NIBJ	: National Investment Bank of Jamaica		
NIC	: National Irrigation Commission		

OECF	: Overseas Economic Co-operation Fund	PTA	: Parent Teacher Association
OECS	: Organization of Eastern Caribbean States	PTD	: Post and Telecommunication Department
OPD	: Office of the Public Defender	R&D	: Research & Development
OPEC	: Organization of Petroleum Exporting Countries	RAP	: Registered Apprenticeship Programme
OPO	: Office of the Political Ombudsman	RADA	: Rural Agriculture Development Authority
OPR	: Office of Professional Responsibility	RCIA	: Resort Cottages Incentives Act
OUR	: Office of Utilities Regulations	READ	: Resistance Education Against Drugs
OVC	: Orphans and Children made Vulnerable	REDD	: Reduce Emissions from Deforestation and Forest Degradation
PAC	: Public Accounts Committee	REDI	: Rural Economic Development Initiative
PAHO	: Pan-American Health Organization	REP	: Rural Electrification Programme
PASS	: Programme for Alternative Student Support	Repo	: Reverse Repurchase
PATH	: Programme of Advancement through Health and Education	RGD	: Registrar General's Department
PC (Bank)	: People's Co-operative Bank	RHAs	: Regional Health Authorities
PCFSL	: Pan Caribbean Financial Services Limited	RHS	: Reproductive Health Survey
PCI	: Participating Credit Institutions	RIP	: Rapid Impact Project
PCJ	: Petroleum Corporation of Jamaica	RITES	: Rail India Technical and Economic Services
PES	: Payments for Ecosystem Services	RMC	: Resident Magistrates Courts
PEIP	: Primary Education Improvement Project	RMFACC	: Richmond Farm Adult Correctional Centre
PETSTATS	: Petroleum Statistics	ROSE	: Reform of Secondary Education
PICA	: Passport Immigration and Citizenship Agency	S&T	: Science and Technology
PIOJ	: Planning Institute of Jamaica	SALISES	: Sir Arthur Lewis Institute for Social and Economic Studies
PIU	: Project Implementation Unit	SARS	: Sudden Acute Respiratory Syndrome
PLA	: Participatory Learning Appraisals	SBAJ	: Small Business Association of Jamaica
PMC	: Portmore Municipal Council	SC	: Supreme Court
PMI	: Peace Management Initiative	SCACC	: St. Catherine Adult Correctional Centre
PMTCT	: Prevention of Mother to Child Transmission	SCIT	: School of Computing and Information Technology
POA	: Programme of Action	SCLR	: Social Conflict and Legal Reform
PPCA	: Police Public Complaints Authority	SDC	: Social Development Commission
PPCC	: Population Policy Co-ordinating Committee	SDF	: Sport Development Foundation
PPCR	: Pilot Program for Climate Resilience	SDGs	: Sustainable Development Goals
PPP	: Peace & Prosperity Project	SDP	: School Development Project
PRC	: People's Republic of China	SERHA	: South East Regional Health Authority
PRCU	: Poverty Reduction Coordinating Unit	SERP	: Support to the Economic Reform Programme
PROMALCO	: Promotion of Management Labour Cooperation	SESP	: Social and Economic Support Programme
PSOJ	: Private Sector Organization of Jamaica	SFP	: School Feeding Programme
PSRA	: Private Security Regulation Authority	SHTM	: School of Hospitality and Tourism Management

SIA	: Sangster's International Airport	UAWU	: University and Allied Workers Union
SIP	: School Improvement Plans	UCJ	: University Council of Jamaica
SIRI	: Sugar Industry Research Institute	UDC	: Urban Development Corporation
SITC	: Standard International Trade Classification	UFW	: unaccounted for water
SLTOP	: School Leavers' Training Opportunities Programme	UK	: United Kingdom
SLB	: Students Loan Bureau	UN	: United Nations
SME	: Small and Medium Enterprise	UNAIDS	: Joint United Nations Programme on HIV and AIDS
SMP	: Staff Monitors Programme	UNDP	: United Nations Development Programme
SOE	: State Owned Enterprise	UNECLAC	: United Nations Economic Commission for Latin America and the Caribbean
SPS	: Sanitary and Phytosanitary	UNEP	: United Nations Environment Programme
SPSE	: Selected Public Sector Entities	UNESCO	: United Nations Education, Scientific and Cultural Organization
SRC	: Scientific Research Council	UNFPA	: United Nations Population Fund
SRH	: Sexual and Reproductive Health	UNICEF	: United Nations Children's Fund
SRHA	: Southern Regional Health Authority	UNIDO	: United Nations Industrial Development Organization
SSF	: Self Start Fund	UNMSDF	: UN Multi-country Sustainable Development Framework
SSN	: Social Safety Net	UNV	: United Nations Volunteers
STATIN	: Statistical Institute of Jamaica	UN Women	: United Nations Entity for Gender Equality and the Empowerment of Women
STIs	: Sexually Transmitted Infections	URTF	: Urban Renewal Trust Fund
STIP II	: Short-term Incentives Programme	USA	: United States of America
STVO	: Subscriber Television Operators	USAID	: United States Agency for International Development
STW	: Steps-to-Work	USDA	: United States Department of Agriculture
TBT	: Technical Barriers to Trade	USDOL	: United States Department of Labour
TCDC	: Technical Co-operation among Developing Countries	UTECH	: University of Technology
TCO	: Technical Co-operation Officer	UVL	: University of Visual Learning
TDB	: Trafalgar Development Bank	UWI	: University of the West Indies
TDMA	: Time Division Multiple Access	VTDI	: Vocational Training Development Institute
TEU	: Twenty-foot Equivalent	WCJF	: Women Centre of Jamaica Foundation
TFACC	: Tamarind Farm Adult Correctional Centre	WebCT	: Web Course Tools
TFR	: Total Fertility Rate	WFDC	: Work Force Development Consortium
THE	: Total Health Expenditure	WFP	: World Food Programme
TIC	: Technology Innovation Centre	WHO	: World Health Organization
TMRI	: Tropical Metabolic Research Institute	WINDALCO	: West Indies Alumina Company
TPDCo	: Tourism Product Development Company	WIP	: Workforce Improvement Programme
TQR	: Tariff Quota Regime	WRA	: Water Resources Authority
TRN	: Tax Registration Number	WRHA	: Western Regional Health Authority
TRQ	: Tariff Rate Quota		
TRY	: Talented Resourceful Youth		
TSACC	: Tower Street Adult Correctional Centre		
TSDP	: Technical High School Development Project		
TVET	: Technical & Vocational Education and Training		

WRMTC	: Waste Research Management & Training Centre	YESS	: Youth Education and Support Systems
WTO	: World Trade Organization	YFS	: Youth-Friendly Service
WWF	: Wigton Wind Farm Limited	YICs	: Youth Innovation Centres
YACJ	: Youth Advisory Council of Jamaica	YMCA	: Young Men Christian Association
YAM	: Youth Advocacy Movemnet	YOU	: Youth Opportunities Unlimited
YAPD	: Youth and Adolescent Policy Division	ZOSO	: Zones of Special Operation
YCA	: Youth Club Assistants		
YEDAI	: Youth Employment in Digital and Animation Industries		

GLOSSARY OF TERMS

Absorption (National)

Total consumption plus investment

Affiliation Order

An order for the maintenance of children born out of wedlock by their fathers.

Age Dependency Ratio

The ratio of the Population in the dependent ages, i.e., those under 15 years plus those in the 65 and over age group to those in the working ages 15 - 64 years.

Balance of Payments (BOP)

The balance of payments (BOP) presented is in a new format which conforms with the international standard as embodied in the 5th edition of the BOP manual published by the International Monetary Fund (IMF). The new presentation of the BOP consists of two main accounts. These are:

- 1) the Capital and Financial Accounts; and
- 2) the Current Account (consisting of the Goods and Services, Income and Current transfers sub-accounts).

Balance of Trade

This appears in the current account of the balance of payments. It is measured by the difference between a country's receipts for visible and invisible exports and its payments for visible and invisible imports.

Balance on Current Account

The difference between (i) exports of goods and services plus inflows of unrequited official and private transfers, and (ii) imports of goods and services plus unrequited transfers to the rest of the world.

Balance on Goods and Services

The difference between the values of exports of goods and services and the import of goods and services.

Bank Administered

Bank Administered projects are defined as loan or grant projects executed by the IDB on behalf of other International Development Partners.

Bank Rate

The rate of interest at which the Central Bank will lend to the banking system. In practice, it is the minimum rate at which the Central Bank stands ready as 'lender of last resort' to provide cash to a discount house with access to the discount office of the Bank, either by discounting first-class (eligible) bills or by lending against their security or against short-dated Government bonds.

Basis Point

One hundredth of a percentage point.

Bauxite (Crude)

Raw, unprocessed bauxite.

Bear

A stock exchange speculator who expects the price of securities to fall and accordingly sells his securities in the hope that he may close the deal by buying them at a lower price.

Bilateral Partners

Countries that provide development assistance to other countries.

Biodiversity

The variety of life forms from genes to species and their respective ecosystems.

Broad money

Narrow money plus quasi money.

Budget Support

The transfer of resources in the form of loans and grants to the Consolidated Fund upon Government's attainment of agreed conditions derived from national policies and is premised on three general eligibility conditions: (i) a stability-oriented macroeconomic policy framework; (ii) progress in public financial management; and (iii) a credible overall/sector policy.

Built Environment

All physical structures that have been built.

Bull

On the Stock exchange, a speculator who believes that the price of securities will increase and accordingly buys in the hope of selling later at a profit.

Canada Fund for Local Initiatives

A fund that provides assistance to non-government organizations and, in exceptional cases, international NGOs and government institutions.

c.i.f.

(Carriage, insurance, freight) indicates that these costs have been included in the price of the commodity.

Capital A

Project fully funded by the Government of Jamaica

Capital and Financial Account

The Capital Account covers capital transfers and acquisition/disposal of non-produced, non-financial assets. The Financial Account covers direct investment, portfolio investment, other investments and official reserves.

Capital B

Project fully funded jointly by the Government of Jamaica and International agencies.

Capital Development Fund (Jamaica)

Operates under Section 12 of the Bauxite (Production Levy) Act of 1974. All sums received as payments under the production levy are paid into the Fund. The Section stipulates that the Minister is responsible for directing the Fund's investment portfolio and money to be withdrawn. The Bank of Jamaica is responsible for holding the Fund.

Capital Market

The constellation of financial institutions (commercial and merchant banks, the stock exchange, mortgage institutions and other organizations) that canalize the supply of the demand for longer-term financial loans or claims. It brings together lenders and borrowers (suppliers and demanders of newly created claims on wealth) and deals in the existing stock of financial claims. Shorter-term loans are negotiated in the 'money market' but there is no clear dividing line between 'short' and 'long' and hence between the 'capital' and the 'money' market.

Capitalization Issue

Issue of bonus shares to existing shareholders. Distribution of accumulated profits and reserves are done in such manner that the total issued capital more truly reflects the capital employed.

Certificate of Deposit

A certificate showing that the owner has deposited a certain sum, at a specified interest rate, for a given period of time.

Ceteris paribus

A Latin term meaning "holding everything else constant".

Changes in stocks

That part of investment consisting of changes in the economy's stocks or inventories of goods - notably stocks of raw materials, semi-finished goods, inventories held by the wholesale or retail trade.

Child Death Rate

The number of deaths of children aged 1- 4 per thousand children in the same age group in a given year.

Child labour

Work performed by children, often under hazardous or exploitative conditions which deprives children of their education and playtime.

Child rights

(see Convention on the Rights of the Child)

Children at risk

(see youth at risk)

CICAD/SRU

CICAD supports OAS member states to strengthen their capacities to effectively disrupt the production, trafficking and distribution of illicit drugs in the region.

Cohort

A group of people sharing one or more common statistical characteristics.

Community development

The process of helping and facilitating a community to strengthen and improve itself through the organization of activities that directly /indirectly affect the wellbeing and livelihood of members of that community.

Consumer Price Index (CPI)

Measures changes in the prices of goods and services purchased for consumption. With respect to Jamaica the CPI is based on a basket of 276 items commonly used by 85.0 per cent of all Jamaican households.

Consumption

That part of final demand/national expenditure that is used up in the current period and is not available for adding to the economy's stock of wealth, e.g., purchases of food and clothing, current expenditure on education, etc.

Contraceptive Prevalence Rate

The percentage of married women of reproductive age who are using (or whose husbands are using) any form of contraception.

Contribution to GDP (in current prices)

The percentage of GDP attributable to each "industry", with industries defined according to the Jamaica Industrial Classification.

Convention for the Elimination of All Forms of Discrimination Against Women (CEDAW)

The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) is a comprehensive international treaty addressing women's rights in political, economic, social, cultural, and family life. CEDAW seeks to secure equal rights for women and to end the discrimination that "hampers the growth of the prosperity of society and the family and makes more difficult the full development of the potentialities of women in the service of their countries and of humanity." (Adopted 1979; entered into force 1981).

Convention on the Rights of the Child (CRC)

The Convention on the Rights of the Child is the first legally binding international instrument to incorporate the full range of human rights—civil, cultural, economic, political and social rights for persons under 18 years old recognising that they often need special care and protection that adults do not. It spells out the basic human rights for children as: survival; development to the fullest; protection from harmful influences, abuse and exploitation; full participation in family, cultural and social life. States parties to the Convention are obliged to develop and undertake all actions and policies in the light of the best interests of the child. (Adopted 1989; entered into force 1990).

Cotonou Agreement

European Aid via the European Community to Africa, the Caribbean and the Pacific states is arranged under the Cotonou Agreement. It is the defining framework of relations between the EC and the African, Caribbean and Pacific (ACP) group of states.

Coronavirus Disease 2019 (COVID-19)

Also called severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2; formerly called 2019-nCoV; is an illness caused by the novel coronavirus which was first identified in Wuhan City, China. It was declared by the World Health Organization (WHO) as a global pandemic in March, 2020. The Virus is transmitted mainly through contact with infectious materials such as respiratory droplets or on contaminated surfaces and is characterized especially by fever, cough, and shortness of breath.

According to the World Health Organization, "Coronavirus disease (COVID-19) is an infectious disease caused by a newly discovered coronavirus. Most people infected with the COVID-19 virus will experience mild to moderate respiratory illness and recover without requiring special treatment."

Coronavirus (who.int)

Crude Birth Rate

The number of births per 1 000 population in a given year.

Crude Death Rate

The number of deaths per 1 000 population in a given year.

Cultural Industry

Sometimes known as creative industries, combines the creation, production and distribution of goods and services that are cultural in nature and are usually protected by intellectual property rights.

Current Account

The Goods and Services sub-category covers merchandize trade, travel, transportation and other services. The Income sub-category includes the compensation of employees and investment income such as profits, reinvested earnings, interest, dividends and other income, while the Current Transfers sub-category is composed of transactions such as taxes on income, workers' remittances, premiums and claims on non-life insurance.

CUSO International

CUSO International is a not-for-profit development organization that works to eradicate poverty and inequality through the efforts of highly skilled volunteers, collaborative partnerships and donors.

Customs Territory

A country and its territorial waters, excluding Free Zones.

Debt Amortization

The gradual repayment of a debt or redemption of securities by periodic payments.

Debt Ratio (External)

Public external debt (including the Central Bank's and government-guaranteed debt) as a percentage of total exports of goods and services.

Debt Service

The sum of interest payments and repayments of principal on external public debt.

Deficit Financing

('Compensatory financing' or 'pump-priming') Large scale borrowing to meet an unusual situation requiring large expenditure. It is more specifically related to the policy employed by Government to finance budget deficits.

Demand for money

A functional relationship between the quantity of money that people want to hold and the variables that determine that quantity. The latter may be income, interest rates, wealth, etc.

Demand Management Policies

Policies aimed at restricting the level of monetary demand, so that the pressure of demand for imports of goods and services is contained and the domestic demand for goods and services does not divert these from export markets.

Demographic Transition

The change from high to low birth and death rates that generally characterizes a population as it moves from a predominantly agricultural to an industrial society.

Demography

The scientific study of the size and structure of populations and its components, causes, consequences and changes of these. Population structure involves the composition and spatial spread of people. Fertility, mortality, migration and social mobility are different processes which separately or in combination produce population change.

Dependency ratio

The ratio of the economically dependent section of the population to the productive section; arbitrarily defined as the ratio of the young (those under 15 years of age) plus the elderly (those 65 years and over) to the population in the working ages (those 15 to 64 years of age).

Disintermediation

Switching funds by depositors from one type of account to another within the same bank to take advantage of interest rate differentials.

Dumping

The practice of selling in foreign markets at lower prices than in domestic markets.

Early Childhood Development

Early childhood development addresses the cognitive and emotional development of children, 0 to 8 years. It requires the holistic development of the child in an environment that is ideally nurturing, caring and safe – to survive, be physically healthy, mentally alert, emotionally secure, socially competent and able to learn.

Emergency Response Coordination Platform, ERCP

An online platform that strengthens the Government's capacity to coordinate the flow of Official Development Assistance for COVID-19. It is also known as the External Support Coordination Platform.

Employer

Any person who operated his (or her) own farm or business (for profit), and who employed paid help

Empowerment

The ability of individuals or communities to do things for themselves gained by increased ability and strength, skills, confidence, more effective organization and the opportunity to participate in decision-making.

Energy Intensity

The ratio of energy used to GDP

E-readiness

The state or quality of being ready for electronic technology, such as the internet.

Exchange Rate

The price at which one currency sells for another.

Exports

Sales abroad of a country's goods and services.

Farmers' Acquisition Programme

This is a COVID-19 response programme being implemented by the Food and Agriculture Organization (FAO).

f.o.b. (Free on board)

Reference indicates that charges for freight and insurance have been included in the price of the commodity.

Fecundity

The physiological capacity of a woman, man or couple to produce a live birth.

Fertility

The reproductive performance, measured by number of births, of an individual, a couple, a group or a population.

FIA Institutions

Merchant Banks, Trust Companies and Finance Houses, governed by the Financial Institutions Act.

Fiscal Policies

Deliberate changes in the taxes that Government collects and money it spends as a means to influence economic activity.

Fixed Domestic Capital Formation

That part of investment consisting of fixed assets such as factories, houses, roads, machinery.

Floating Exchange Rate

An exchange rate which is allowed to fluctuate according to supply and demand in the foreign exchange market.

Fluorescence Spectroscopy

This is an analytical method to measure specific elements in a sample.

Free Zones

Specified areas in which production takes place as if conducted outside Jamaica.

(GDP) Gross Domestic Product

The total final output of goods and services produced by an economy. With respect to Jamaica, this excludes the output from the Free Zones.

GDP Deflator (implicit)

This is calculated by dividing, for each year of a series, the value of GDP in current market prices by the value of GDP in constant market prices. It is often used as an indicator of inflation because it is so broad based, showing as it does, annual price movements for all goods and services produced in an economy. GDP Deflator. By dividing GDP in current prices by GDP in constant prices ("real GDP") one may obtain an implicit price index that covers a wider range of goods and services than does the CPI.

GDP, nominal

Total final output in current prices.

GDP, real

Total final output adjusted for price movements.

Gender

Gender refers to the array of socially constructed roles, attitudes, behaviours, values, relative power and influence that society ascribes to males and females on a differential basis. Whereas biological sex is determined by genetic and anatomical characteristics, gender is an acquired identity that is learned, can change over time, and varies within and across cultures. Gender is relational and refers not simply to women or men but to the relationship between them.

Gender analysis

Gender analysis is a systematic way of looking at the different impacts of development, policies, programmes and legislation on women and men that entails, first and foremost, collecting sex-disaggregated data and gender-sensitive information about the population concerned.

Gender awareness or gender sensitive

Gender awareness means the ability to identify problems arising from gender inequality and discrimination. To be gender sensitive is having the ability to recognize gender issues, and especially the different perceptions and interests arising from their different social locations and different gender roles.

Gender based violence

Gender based violence is an umbrella term for the perpetration of harm to a person against their will that is the result of power imbalances that exploit gender related distinctions between males and females, amongst males, and amongst females. While women, men, boys and girls can be victims of gender-based violence, women and girls are the main victims. Such violence encompasses but is not limited to physical, sexual and psychological violence (a) occurring in the family, including battering, sexual exploitation, sexual abuse of children in the household, dowry-related violence, marital rape, female genital mutilation and other traditional practices harmful to women; (b) occurring within the general community, including rape, sexual abuse, sexual harassment and intimidation at work, in educational institutions and elsewhere, trafficking in women and children, and forced prostitution; (c) perpetrated or condoned by the State and institutions, wherever it occurs.

Gender equality

Gender equality means that all human beings, both men and women are free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles, or prejudices on grounds of a person's sex in the allocation of resources or benefits, or in the access to services. Gender equality may be measured in terms of whether there is equality of opportunity, or equality of results. It does not mean that women and men have to become the same, but that their rights, responsibilities and opportunities will not depend on whether they are born male or female.

Gender equity

Gender equity means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities.

Gender mainstreaming

A process of integrating a commitment to equality between men and women into an organization's strategy, policies and operations by assessing the implications for women and men of any planned action, including legislation.

GIS

A GIS is a system of hardware, software and procedures to facilitate the management, manipulation, analysis, modelling, representation and display of georeferenced data to solve complex problems regarding planning and management of resources.

Governance

The process of decision-making and is the process by which decisions are implemented. Good governance has eight major characteristics, viz., participation, rule of law, transparency, consensus, equity and inclusiveness, responsiveness, effectiveness and efficiency, and accountability.

Government Securities

Include Treasury Bills, Bonds, Local Registered Stocks.

GovNet

GovNet is defined to be a secure, wide area network communication infrastructure that will connect government ministries, agencies and departments to facilitate shared services, including data centre computing services (Gov-Cloud), consolidated voice communication system (Gov-Talk), consolidated email system (Gov-Email) and Gov-Internet.

GWEP

Graduate Work Experience Programme.

Gross National Product GNP

Total GDP plus net income transfers from abroad.

HOPE

Housing Opportunity Production and Employment.

Hybrid Model Loan

A hybrid model loan features an investment loan and a programmatic policy-based loan (PPBL).

Heritage

Practices that are handed down from the past by tradition; any attribute or immaterial possession that is inherited from ancestors.

Imports

Purchases of goods and services from the rest of the world. Alternatively it may represent payments in kind to the importing country made in exchange for the exportation of goods, for services rendered, e.g., shipping, banking, insurance.

Index Number

A number, usually a weighted average, which shows change over time relative to a given base period. Price and quantity indices, for example, are summary price and quantity changes from one time to another.

Industrial Production, index of

Measures changes in physical volume of output in manufacturing, mining and electricity in Jamaica.

Infant Mortality Rate

The number of deaths of infants 0 - 11 months per 1 000 infants in the same age group in a given year.

Inflation

A persistent or sustained rise in the general price level.

Inner city

Core urban areas that are economically distressed often characterized by high population density, limited sanitation, inadequate housing infrastructure, poverty and unemployment.

Innovation

The conversion of knowledge and ideas into a benefit, which may be for commercial use, or for the public good; the benefit may be new or improved products, processes or services.

Interest, real rate of

Nominal rate of interest adjusted for inflation.

Investment

That part of final output that is used to add to the economy's stock of wealth.

ISO/IEC 17025 Accredited Laboratories

ISO/IEC 17025 specifies the general requirements for the competence to carry out tests and/or calibrations, including sampling.

Labour Force Participation Rate

The percentage of the labour force age 14 years or older, divided by the total population 14 years or older.

Labour Force

Economically active persons, age 14 years and over, including the armed forces and the unemployed, but excluding housewives, students, and other economically inactive groups.

Legislative Productive Management System

This is an electronic platform that manages the life cycle of legislative documents, from drafting to publishing. The relevant MDAs will be better able to view and track the status of proposed legislation.

Life Expectancy at birth

The average number of years a new-born would live if subject to the mortality risks prevailing for the cross-section of population at the time of his birth. Life expectancy at later years is the average number of years a person already at a given later age will live. Life expectancy at age five and above can exceed life expectancy at birth substantially if the infant mortality rate is high.

Liquidity

Relates to the ease or convenience with which an asset can be converted from one form to another without loss of value.

Maintenance Order

An order other than an order of affiliation for the periodical payment of sums of money towards the maintenance of the wife or other dependents of the person against whom the order is made.

Masculinity/Femininity

As a form of identity masculinity and femininity presents a set of cultural ideals that define appropriate roles, values

and expectations for and of men and for and of women respectively. Unlike the biological state of maleness/femaleness, masculinity/femininity is constructed socially, historically, politically and culturally; and is learnt through participation in home, community and wider society.

Millennium Declaration

The declaration, agreed and adopted by 189 countries at the UN Millennium Summit in September 2000, provided the basis for the Millennium Development Goals (MDGs). Millennium Development Goals (MDGs)

A set of eight goals, together with specific, quantifiable and time bound targets, that were agreed and adopted by 189 countries at the UN Millennium Summit in September 2000. The MDGs involve a shared commitment to reduce poverty, hunger, disease, illiteracy, environmental degradation and discrimination against women and ensure human development and economic progress in all countries by 2015 or sooner.

Monetary base

Comprises currency issue, current account of commercial banks and statutory cash reserve. Currency issue comprises currency in the hands of the non-bank public in addition to vault cash held in the banking system. Current accounts of commercial banks comprise transaction balances and excess reserves. Data reflect credit balances only.

Money supply/Broad money (M2)

Narrow money (M1) plus quasi-money (include local and foreign currency items).

Money

Any commodity widely acceptable as means of exchange and a measure of value, in payment for goods and services, or in the discharge of debts or obligations

Multi-donor Funds

These are trust funds administered by the Inter-American Development Bank. They include: the Capacity Building Initiative for Transparency Trust Fund, Compete Caribbean Partnership Facility, Multi-donor AquaFund, Early Childhood Development Innovation Fund, Nordic Development Fund and Multi-donor Disaster Prevention Trust Fund.

Multilateral Financing Institutions, MFIs

These are institutions created by a group of countries that provide for national development and include the Inter-American Development Bank, Caribbean Development Bank, the World Bank and the European Union.

Multilateral Investment Fund

This is arm of the Inter-American Development Bank that funds private sector ventures.

Narrow money (M1)

Currency in the hands of the public plus demand deposits.

National Income

The sum of the values of all goods and services available in any period for consumption or for adding to wealth. It may be calculated as the sum of incomes or expenditure which theoretically must be equal since all expenditure in a country must generate incomes in equal amount.

Natural Hazards

These are events in the physical environment for example hurricanes, volcanic eruptions, landslides, tsunamis, floods and drought which cause destruction to human life and property.

Net Exports

The excess of exports of goods and services over imports of goods and services.

Neutron Activation

This is an analytical method using the nuclear reactor to measure specific elements in a sample.

Nominal Exchange Rate

The amount of domestic currency that can be bought with an amount of foreign currency.

Open Market Operations

The buying or selling of securities on the open market by the Central Bank to influence both interest rates and the level of commercial bank deposits and therefore the supply of money.

Own Account Worker

Any person who operated a farm or a business (for profit), who did not employ any paid help. If the economic activity had the help of unpaid workers, they are still be classified as 'Own Account Worker'.

Official Development Assistance, ODA

ODA is defined as concessionary loans, grants and technical assistance to developing countries for the promotion of their economic development and welfare as its main objective.

PDA Institutions

Protection of Depositors Act Institutions are financial intermediaries, which are near banks. Unlike commercial banks these institutions cannot offer current account services.

Payment for Ecosystem Services (PES) Scheme

This is a programme that provides incentives to farmers or landowners in exchange for sustainably managing their lands, resulting in the conservation of natural resources in the marketplace.

Persons outside the Labour Force

This category includes all persons 14 years and over who were not classified as employed or unemployed. This includes students, persons engaged in home duties, persons incapable of working, persons who did not want to work or were not available for work.

Person with disability

A person who has a long term physical, mental, intellectual or sensory impairment(s) which may hinder their full and effective participation in society.

Phytosanitary systems

Systems put in place to ensure animal and plant health.

Population growth rate

The rate at which a population is increasing (or decreasing) in a given year due to natural increase and net migration, expressed as a percentage of the base population.

Population momentum

The tendency for population growth to continue beyond the time that replacement-level fertility has been achieved because of the large and increasing size of cohorts of child-bearing age and younger, resulting from higher fertility and/or falling mortality in preceding years.

Port State Measures

This is an international agreement to prevent and eliminate illegal, unreported and unregulated (IUU) fishing

Postpartum

Refers to the time immediately after childbirth.

Prime Rate

The bank rate plus a two percentage point margin.

Private Consumption

That part of total consumption that is carried out by private individuals in their personal capacities. Also, includes current expenditures of nonprofit organizations.

Protectionism

The limitation of imports into a country in order to protect national firms from foreign competitors.

Public Consumption

That part of total consumption carried out by public authorities, e.g., expenditure on defence, health, education, law, etc.

Quasi-money

Time and savings deposits

Rate of natural increase

The rate at which a population is increasing (or decreasing) in a given year due to a surplus (or deficit) of births over deaths. The rate of natural increase equals the crude birth rate minus the crude death rate per 100 people. It also equals the population growth rate minus emigration.

Rate of Natural Population Growth

The difference between the crude birth rate and the crude death rate. Emigration and immigration are not included.

Real Effective Exchange Rate

A weighted average of the country's real exchange rate with the currencies of important trading and investing partners. The weights are chosen to reflect the importance of each trading partner. Similarly, the nominal effective rate is a weighted average of the country's nominal exchange rates.

Real Exchange Rate

The nominal rate adjusted by the domestic country's inflation rate relative to that of the respective foreign country.

Recidivism

A relapse into crime, that is, multiple convictions and incarcerations.

Resource Balance

The difference between exports and imports of goods and non-factor services.

Reverse repurchase agreement

This is the facility under which the Central Bank sells stocks of Treasury Bills, Local Registered Stocks, or Equity Investment Bonds to absorb excess liquidity and simultaneously arrange to repurchase these securities within a prescribed period at an agreed rate of interest, which is announced from time to time and is referred to as the reverse repurchase, reverse repo, indicative or benchmark rate.

Screw-driver Industries

Assembly type manufacturing industries.

Single Entity Free Zones

Privately operated and managed companies that enjoy similar benefits as those companies that operate in the traditional free zone industrial estates.

SLTOP

School Leavers' Training Opportunities Programme.
A market in which members trade in securities, both on their own account and on behalf of others.

Tariffs

Customs duties - they must be ad valorem - as a percentage of the value of goods, or specific as a stated amount per unit of weight, volume, etc.

Terms of Trade

The net barter terms of trade is calculated as the ratio of country's index of export unit values to that of import prices.

Tolling contracts

Independent smelters that operate on a contractual basis to supply a specified quantity, often at a given price.

Total Bauxite

Bauxite production including that transformed into alumina.

Total fertility rate

The average number of children that would be born alive to a woman (or group of women) during her lifetime if during her child-bearing years she were to bear children at each age in accord with prevailing age-specific fertility rates.

Trade Balance

The difference between the exports and imports of goods and services. The difference between the exports of goods is called the merchandise balance while the difference between the exports of services is called the services balance.

Trail restoration plots

This is the creation of pathways to ensure ease of access, reduced soil compaction and serve as a fire break.

Transfer Payment

Payments other than those made for productive services particularly transfers of money by the government in grants, allowances, pensions from tax payers to people in need such as pensioners, widows, the sick, unemployed and others with little or no other income.

Treasury Bills

Means by which Governments borrow for short periods. They represent a promise by the borrower to pay a stated sum within a period not exceeding one year. In practice they are not issued for more than three months.

Trust Funds

A trust fund is a financing arrangement set up with contributions from one or more donors. Trust funds finance a specific activity or a program of activities.

Tsunami

A large ocean wave which is produced by an underwater earthquake or volcanic eruption.

UK Blue Carbon Fund

The Fund promotes the sustainable management, conservation and restoration of mangrove habitats by developing and embedding operational blue carbon markets across the Caribbean and Latin America that provide local communities with a sustainable income and assist in moving low-income countries towards low-emission and climate-resilient develop.

United Nation Population Fund, UNFPA

The Convention seeks to fight the illicit trafficking of cultural property by modifying the buyer's behaviour, obliging him/her to check the legitimacy of his/her purchase.

Unpaid Worker

Any worker who worked either on a farm or in some economic activity, but without expecting to or receiving any payment in cash or kind. An Unpaid Worker is usually related to the individual with whom he works (by blood or marriage).

Uricosuric

An anti-gout used against the medical condition called gout.

Violence Against Women

Violence against women refers to any act of gender-based violence that results in, physical, sexual and psychological harm to women and girls, predominantly perpetrated

by men, whether occurring in private or in public that reinforces female subordination and perpetuates male power and control.

Wholesale Price Index (WPI)

The most comprehensive measure available for the general price level of commodities. It records periodic changes in the prices of all goods sold in the primary markets in the country ranging from raw materials to finished goods.

World Fit for Children (WFFC) Declaration

The UN Special Session on Children held in May 2002 culminated in the official adoption, by some 180 nations, of its outcome document, "A World Fit for Children". The agenda from this Special Session has been called the "World Fit for Children Declaration" and includes 21 specific goals and targets for the next decade focusing on four key priorities: promoting healthy lives; providing quality education for all; protecting children against abuse, exploitation and violence; and combating HIV/AIDS.

Youth at risk

Children (0-18 years) and youth at risk (15 – 24 years) are those whose living conditions, social circumstances and family situation or community setting may not allow them to maximize their full potential and pose a threat to their life outcomes. Children/youth at risk are often, though not exclusively characterised by: irregular school attendance; fluctuating school performance; early sexual initiation (under 16 years); engaging in substance abuse; anti-social/aggressive behaviour towards peers and adults; limited reading proficiency; having experienced abuse or trauma; having a disability and/or having exhibited behaviour problems

INDEX

A

Access Financial Services 13.12
Adolescent Mothers 25.18
Administration education 22.5-12
Agriculture
 export earnings 10.1
 policies 10.2
 production index 10.1,10.2
 real value added 10.1
Agricultural Competitiveness Bridging Project 10. 3
Agriculture Financing 10.11
African Caribbean and Pacific (ACP) 1.7, 6.1
Alumina 11.2, 11.3, 11.5
Aluminium 11.2
 Exports 11.5
Aluminium Efficiency 11.4
Alumina utilization rate 11.3
ALPART JISCO 11.11.3, 11.5
Amortization 8.11, 8.14
Amusement Licences 18.8
Animal Farming 10.10
Australia 2.13
Average Length of stay 17.5

B

B-FXITT 7.3
Balance of Payments 6.4
 Current Account 6.4
 Capital Account 6.4
 Banana
 Export 10.6
 Production 10.6
Banana Fusarian Wilt Disease 2.23
Bank Administered 2.10
Bank of Jamaica (BOJ) 9.2
Bilateral Cooperation 2.13, 2.15
Bilateral Partners 2.1 – 2.4, 2.7, 2.21
Biodiversity 3.14
Biological Oxygen Demand (2.25)

Brexit 1.7
British Council Investment Climate reform (ICR) Facility 13.2
Broadcasting 18.3
Bureau of Standards Jamaica (BSJ) 12.4, 13.4, 19.3
Budget Support 2.2, 2.5, 2.7, 2.9, 2.10, 2.13
Building Construction 14.4
Building Societies 9.9
Business Confidence 12.7

C

Canada 2.13–2.15
Canada Fund for Local Initiatives 2.14
Cannabis Licensing Authority 12.4
Capacity Utilization Rate 11.3
Cargo logistics Centre 14.8
Caribbean Development Bank (CDB) 2.2–2.3
Caribbean Tourism Performance 17.9
Caribbean Single Market and Economy Certificates 6.2, 20.16
CARICOM 1.6,6.2,
CARICOM Trade 6.7
CARIFORUM-Economic Union (EU) Economic Partnership Agreement (EPA) 1.7, 6.2
Catastrophic Risk Financing 3.6
CHASE Fund 25.34
Child and Adolescent Mental Health 23.19, 25.9
Child Diversion Programme 24.20
Children 25.4
Children and Youth 25.3
 Legislation, Policy and Research 25.4
Children in Care 25.7
Children at Risk 25.6
CICAD/SRU 2.26
Citizen Security & Justice Programme (CSJP) 24.3
Classification of Individual Consumption by Purpose (COICOP) 7.7
Climate 3.6, 3.9–3.11
Climate Change 3.1–3.11, 3.27
Civil Engineering 14.4

Civil Registration Relayed Activities 20.16
 Coastal and Marine Resources 3.12
 Cocoa
 Earnings 10.2
 Production 10.7
 Coconut
 Lethal Yellowing 10.7
 Production 10.7
 Coffee
 Earning 10.2
 Production 10.6
 Collective Management Organization 18.8
 Commercial Complex, Montego Bay Free Zone 14.8
 Commodity Prices 1.9
 Communication 16. 8
 Community access points 16.12
 Fixed Subscription 16.12
 Licences for telecommunication services 16.11
 Mobile telephone subscribers 16.12
 New Investments 16.10
 Office of Information Commissioner 16.9
 Open Data Policy 16.9
 Performance 16.11
 Policy Framework 16.8
 Post and Telecommunications Department 16.12
 Quality of Service Rules 16.10
 Commonwealth Citizens and Aliens 20.15
 Commonwealth Secretariat 2.23
 Community Development 25.3
 Community Renewal Programme 25.23
 Community Research and Development 25.21
 Community Safety and Security 24.12
 Consumer Affairs Commission 19.5
 Consumer Confidence 12.8
 Consumer Price Index 7.6
 Construction
 inputs 14.6
 other financing 14.8
 Construction Industry Policy of Jamaica 14.2
 Council for Trade and Economic Development (COTED)
 6.2
 Counter Terrorism and Organized Crime 24.12
 Courts 24.21
 Covid-19 10.1, 14.1
 Creative Industries Investment Projects 18.5
 Creative Production and Training Centre (CPTC) 25.32
 Cricket 18.10
 Crimes

Arrest 24.8
 Category 1 24.8
 Murder 24.8
 Total crimes 24.8
 Crime Stop Programme 24.13
 Crude Bauxite 11.3
 Culture 25.31
 Culture 25.4
 CUSO International 2.14
 Institute of Jamaica 25.33
 Jamaica National Heritage Trust 25.33

D

Data Protection Bill 16.10
 Debt Management Strategy 8.4
 Debt Stock 8.14
 Department of Correctional Services 24.14
 Community services 24.17
 custodial and non-custodial clients 24.14
 Initiatives 24.18
 Deposit-taking institutions 7.1-7.2
 Deportation 24.11
 Destination Assurance Programme 17.2
 Destination Assurance Strategy Framework
 Development Bank of Jamaica (DBJ) 13.8
 Development Application and Management 3.16–3.18
 Domestic Crop Production 10.8–10.9
 Domestic Environment 11.3
 Disaster Risk Management 3.21
 Drought 3.7–3.8, 3.14, 3.21

E

Early Childhood Development 25.5
 Earthquakes 3.21
 Economic Policy Framework 5.2
 Edna Manley College of the Visual and Performing Arts
 22.14
 Education and Research 25.18
 Education and Training Introduction 22.1
 financing 22.2-4
 Special 22.7
 Early childhood 22.8
 Primary 22.8–22.10
 Secondary 22.10–22.13
 Tertiary Education and Training 22.13
 Electricity
 consumption and charges 15.11

disposal & revenue 15.11
 generating capacity 15.10
 generation 15.11
 heat-rate fuel consumption and fuel cost 15.11
 Electricity and water supply 5.4
 Electronic Banking Transaction 4.12
 Emergency and Disaster Risk Management 23.19
 Emergency Response Coordination Platform, ERCP 2.27
 Emergency Road Repair 14.3
 Employment 10.11, 11.6, 12.10, 13.8, 14.7,16.2, 19.9, 21.2
 by age and sex 21.3
 by employment status 21.3
 by industry 21.5
 Employment Trends global 1.5 16.2
 Energy Sector
 domestic market 15.5
 average billing prices 15.6
 consumption 15.8
 imports 15.6
 petrojam sales 15.6
 production 15.5
 Policies and Programmes 15.2
 Energy Efficiency and Conservation 15.3
 Energy Management and Efficiency Programme 15.3
 Environmental Health 23.19
 Essential National Health Research 23.18
 Essex Valley Agricultural Development Project (EVADP) 10.4
 European Union 2.8–2.9
 Excess Fund Rate 7.1
 Expenditure 8.2, 8.10, 8.12
 Exports 12.10
 External Trade 6.4
 Merchandise Export 6.7
 Merchandise Imports 6.5
 Merchandise Trade 6.4
 Traditional Domestic Export 6.7
 Non-traditional Domestic Exports 6.7
 European Union (EU) 2.4, 2.28–2.29

F

Fair Trading Commission (FTC) 19.2
 Falmouth East Masterplan 14.8
 Family Planning Initiatives 20.6
 Farmers' Acquisition Programme 2.3
 Fertility and Family Planning 20.5
 Finance and Insurance 9.1–9.12
 Financing 24.1, 24.2

Financing of the industry 12.11, 18.9
 Financing for Sustainable Development 3.5
 Fires 3.20–3.21
 Fire Safety 25.19
 Fiscal Policy 8.2
 Fiscal Programmes 8.5
 Fishing
 aquaculture 10.10,10.11
 marine 10,10.10.11
 Five Year Growth Strategy 12.2
 Food and Agriculture Organization (FAO) 2.23
 Food Beverages & Tobacco 12.8
 Football 18.10
 Foreign Exchange Market 6.9
 Foreign Exchange Trading Platform 7.2, 7.4–7.5
 Foreign Exchange Swap Arrangement 7.5
 Foreign Direct Investment 1.8
 Forest Resources 3.11–3.12, 3.24
 Functional Classification of Expenditure 8.5

G

GDP Nominal 5.1
 producers of government services 5.6
 real estate & business activities 5.6
 total real value added 5.1
 transport, storage & communication 5.5
 wholesale & retail trade; repair and instillation of
 machinery (WRTRIM) 5.5
 Gender 25.3,25.15
 Gender-based Violence 2.13–2.15, 2.20, 2.29
 Gender Mainstreaming 25.16
 Legislative, Policy and Programme 25.16
 General Health Status 23.5
 Births and Deaths 23.5
 Injuries and other Emergencies 23.6
 Other Public Health Threats 23.8
 Geospatial Applications 3.24
 GIS Growth Survey 3.22
 Government Funding to Sporting Industry 18.10
 Global Economic Conditions 1.2
 Output global 1.3
 Trade global 1. 4
 Inflation, global 1.5
 Global Environment Facility Small Grants Programme
 2.23–2.24
 Global Environmental Fund (GEF) 2.5, 2.10
 Global Forum on Migration and Development (GFMD) 20.17

Global Fund to Fight AIDS, Tuberculosis and Malaria
 Programme 2.25–2.26, 2.31
 Global Innovation Index (GII) 4.13
 Global Wholesale & Retail Trade 19.10
 Gordon Town to Papine Road Repair 14.8
 Gross Domestic Product 5.1
 agriculture, forestry & fishing 5.4
 construction 5.4
 electricity & water supply 5.4
 finance & insurance services 5.6
 hotels & restaurants 5.6
 manufacturing 5.4
 mining & quarrying 5.4
 producers of government services 5.6
 real estate & business activities 5.6
 transportation, storage & communications 5.5
 GovNet 2.12

H

Health Sector financing 23.2
 Programme Supporting Health Service Delivery 23.16`
 Programme for non-communicable Disease 23.16
 Health Service Delivery 23. 11
 Utilization of Public Health System 23.11
 Secondary Care 23.12
 UHWI 23.13
 Pharmacies in public hospitals 23.13
 Primary Care 23.14
 HIV Response 23.18
 Heart/NSTA Training Programme 25.9
 Hotels & Restaurants Industry 17.1
 Household Expenditure Survey 7.2, 7.9
 Housing Agency of Jamaica 14.4
 Housing Completions 14.4
 Housing Starts 14.4
 Housing Portfolio 14.3
 Housing Public Private Partnership Policy 14.4
 Hutias 2.25
 Human Resource for health 23.18
 Hybrid Model Loan, 2.11

I

Impact of COVID 19 18.1
 India 2.17, 2.30
 Industry Performance 5.4
 Construction 5.4
 Independent Commission of Investigations 24.23

Finance and insurance services 5.6
 Infrastructure Development 14.9, 25.19
 Inflation 7.1, 7.6
 Initiative for Men 25.17
 Integrated Resource Plan (IRP) 15.3
 Intellectual property 18.2
 Inter-American Development Bank (IDB) 2.10–2.13
 International Atomic Energy Agency (IAEA) 2.20, 2.25
 International Bank for Reconstruction and Development,
 IBRD – The World Bank 2.13
 International Commodity Markets 1.7
 International Development Partners 2.1, 2.31
 International Environment 11.2
 International Financial Markets 1.8
 International Migration 20.9
 International Monetary Fund 8.15
 International Oil Market 15.4
 International Organization for Migration, IOM 2.19
 International Trade Development 1.6
 Brexit 1.7
 CARICOM 1.6
 CARIFORUM-Economic Union (EU) Economic
 Partnership Agreement (EPA) 1.7
 Organisaton of African, Caribbean and Pacific (OACP)
 1.6
 United States–Mexico–Canada Agreement (USMCA) 1.7
 International Tourism Performance 17.9
 Insurance Act 9.2
 Insurance Companies
 Life 9.11
 General 9.11
 Introduction 7.1, 17.1, 20.1, 22.1, 23.1.25.1
 Investments Facilitation 12.5
 Involuntary Returned Migrants 20.14

J

JAMPRO 12.5
 Jamaica Business Development Corporation 12.4, 13.1, 13.3
 Jamaica Constabulary Force (JCF) 24.6
 Jamaica Cultural Development Commission (JCDC) 25.32
 Jamaica Defence Force (JDF) 24.13
 Jamaica Deposit Insurance Corporation (JDIC) 9.5
 Jamaica 4H Club 25.11
 Jamaica Intellectual Property Office 12.3
 Jamaica Manufacturer and Export Association (JMEA) 12.6
 Jamaica Mortgage Bank 14.8
 Jamaica Music Society (JAMMS) 18.9

- Jamaica National Commission for UNESCO 25.34
 Jamaica National Council on Reparations (JNCR) 25.32
 Jamaica National Small Business Loan 13.10
 Jamaica Public Service Company (JPS) 14.5
 Jamaica Social Investment Fund (JSIF) 14.5-6, 25.22
 Jamaica Trade Information Portal 12.2
 Jamaica Stock Exchange (JSE) 9.12
 Japan 2.17
 Justice 24.19
 Justice Training Institute 24.21
- K**
- Kingdom of Morocco 2.18
 Kingston Logistics Park Development 14.3
 Kingston YMCA 25.11
- L**
- Labour Force 21.1
 Labour Force and Employment 21.1
 Labour Market Information 21.8
 Labour Migration 21.6
 Labour Productivity 14.7
 Land Divestment 3.19
 Land Resources 3.6, 3.16
 Legislation Policies and Plans 23.4
 Legislative Productive Management System 2.15
 Legal Aid Council 24.20
 Local Development 25.19
 Local Economic Development Support 25.21
 Licencing of tourism entities 17.4
 Liquefied Natural Gas 15.8
- M**
- Major Organized Crime and Anti-Corruption Task Force (MOCA) 24.12
 Major Infrastructure Development Programme 14.5
 Management Information System 24.20
 Management Institute for National Development 22.16
 Manufacturing & Export Growth Team 12.3
 Other manufacturing 12.8
 Real sales by manufacturers 12.12
 Marketing and Promotion 17.4
 Marine Water Quality 3.13-3.14
 Medical equipment 2.14
 Medium Term Socio-Economic Policy Framework (MTF) xiii, 2.1, 14.2
 Micro Investment Development Agency 13.3
 Micro, Small and Medium-Sized (MSME) Enterprise 13.1
 MSME Financing 13.8
 Alumina Production Cost 11.4
 crude bauxite 11.3
 earnings 11.6
 minerals 11.1-11.7
 limestone & Whitining 11.7
 marl/fill 11.7
 Pozzolan 11.7
 Sand/gravel 11.7
 Minimum Wage 21.8
 Ministry of Culture, Gender, Entertainment and Sports (MECGES) 25.31
 Economic Growth and Job Creation 14.2
 Industry, Investment & Commerce 13.1, 19.2
 National Security 24.1
 Transport & Mining 11.1
 Missing Persons 24.10
 Monetary Base 7.6
 Monetary Policy Management 7.3
 Monitoring Implementation of the National Policy on International Migration and Development 20.17
 Montego Bay Freeport 14.3
 Montego Bay Perimeter Road Project 14.8
 Mortality 20.9
 Mortgage Financing 14.7
 Motion Picture, Radio, Television and Other Entertainment Activities 18.6
 Motion Picture Receipt 18.6
 MSME and Entrepreneurship Policy 13.1
 Multi-donor Funds 2.1
 Multilateral Financial Institutions (MFI) 2.1, 2.8
 Multilateral Investment Fund 2.7
 Multilateral Technical Cooperation, MTC 2.23-2.34
- N**
- National Broadband Initiative 16.9
 National Business Portal 12.2
 National Compliance and Regulatory Authority 19.4
 National Council on Drug Abuse 23.19
 National Craft Policy 12.2
 National Cultural and Creative Industries Council (NCCIC) 25.31
 National Export-Import Bank of Jamaica, 13.11
 National Housing Policy 14.3
 National Housing Trust (NHT) 14.4
 National History Museum of Jamaica 25.33

National Library of Jamaica (NLJ) 25.32
 National Police College of Jamaica 24.13
 National Road Operating and Construction Company (NROCC) 14.5
 National Security
 border security and control 24.5
 crime prevention and community safety 24.3
 offender management 24.5
 National Security interest in Personnel property (NSIPP) 13.2
 National Works Agency (NWA) 14.4
 Natural and Manmade Hazards 3.19
 New Customs Legislation 12.3
 New ODA 2.1–2.4
 Net Domestic Assets (NDA) 7.6
 Net flows 2.8
 Net International Reserves (NIR) 6.4, 7.7
 Non-Performing Loan 9.5
 Non-Residential Building Construction 14.4
 Northern Caribbean University 22.13

O

Office of the Public Defender 24.23
 Official Development Assistance (ODA)
 Bilateral 2.13–2.21
 Multilateral Technical Cooperation 2.23–2.30
 Multilateral Financing 2.1, 2.8
 Total disbursements 2.4–2.5
 Oil and gas exploration 15.4
 Operations 24.14
 Organization of African Caribbean and Pacific (OACP) 1.6
 Organization of American States (OAS) 2.26
 Other Agricultural Crops 10.8
 Other Construction 14.4
 Other Manufacturing 12.8
 Outlook 2.30, 4.14, 10.12, 14.8, 15.17, 18.13, 21.11, 22.17, 16.12, 23.20, 24.23, 25.35
 Overseas Employment programme 21.7

P

Partners in Health Care 23.19
 Pan American Health Organization/world Health Organization (PAHO/WHO) 2.26–2.27, 23.20
 PAJHQ & Commercial Development 14.9
 Payment for Ecosystem Services (PES) Scheme 2.12
 People's Republic of China 2.16–2.17

Performance 14.4, 2.2.12
 Persons with Disabilities 25.12
 Physical Infrastructure 24.19
 Policy Framework 7.2
 Policies and Programmes 11.1, 14.2, 18.1
 Political and Economic Empowerment 25.17
 Population
 Growth Size 20.2
 Population Age Structure 20.3
 Dependency Ratios 20.5
 emigration 20.11
 immigration 20.13
 Port Authority of Jamaica 14.5
 Port Royal Cruise Ship Terminal Development 14.3
 Port State Measures 2.23
 Poverty reduction 25.24
 Production 12.8
 Productivity 21.9
 Productivity Incentive Programme (PIP) 10.1
 Primary Balance 8.1 8.8, 8.12
 Producer Price Index 7.10, 12.8
 Protected Areas 3.15
 Public Bodies 8.5
 Public Procurement Regulations 13.1
 Public Sector Energy Efficiency and Conservation Programme 15.3
 Public Sector Reform Transformation 8.3

Q

Quality of Petroleum Imports 15.3

R

Real Sales by Manufacturers 12.12
 Real Value added 16.1
 Redevelopment of Hampden Wharf 14.3
 Re-development of Reynolds Pier, St. Ann 14.3
 Reform Agenda 8.2
 Regional Health Authorities 23.15
 Remittances 6.9
 Republic of Cuba 2.16–2.17
 Republic of Korea 2.17–2.18
 Research and Evaluation 24.6
 Residential Building Construction 14.4
 Rural Agriculture Development Programme (RADA) 10.4
 Revenue Strategy 8.3
 Revision of the National Population and Development Policy 1995 & Programme of Action 20.16

S

Safe School Programme 24.13
 Sars-Cov2 The Caronaavirus Disease 2019 (COVID 19)
 Pandemic 23.9
 Sectoral Allocation of New ODA 2.5–2.7
 Select Programme (culture) 25.3
 Senior Citizens 25.14
 Science Technology and Innovation 4.1
 E-government 4.10
 E-readiness 4.10
 innovation 4.12
 publications 4.14
 Intellectual Property 4.13
 Agriculture 4.8
 Energy 4.8
 Health 4.9
 Scholarships and Training 2.21
 Social Assistance 25.25
 Social Enterprise 13.2
 Social Enterprise Working Group 13.2
 Social Development 25.3
 Social Housing Programme 25.21
 Social Insurance 25.30
 Social Justice Services 24.20
 Spatial Planning 3.18 ,20.18
 Sports for community Development 25.21
 Social Protection 25.3, 25.24
 Southern Coastal Highway Improvement Project 14.2.14.8
 Standing liquidity Facility 7.1
 Standards Development and Accreditations 4.3
 Storage 16.8
 STI capacity Building 4.7
 STI Education 4.5
 STI Financing 4.3
 STI popularization 4.8
 Sugar Production 10.4
 Earnings 10.5
 Export 10.6
 Suicides 24.10

T

Teledensity 4.11
 Technology and Infrastructure Projects 24.10
 Technology Use and Transfer 4.10
 The Jamaican Diaspora 20.19
 The Labour Force 21.1
 The National Water Sector Policy and Implementation Plan 15.13

Total Real Value Added 5.1
 Tourism
 Cruise Passenger Arrivals 17.7
 Employment 17.8
 Stopover Arrivals 17.6
 Total visitor arrivals 17.5
 Tourist expenditure 17.8
 Tourism linkage with other Sectors 17.2
 Tourism training 17.3
 Track and field 18.12
 Traditional Export Crop 10.4
 Trade Board 19.6
 Traffic Accidents 24.12
 Trafficking in Persons 24.5
 Trail restoration plots 2.26
 Transnational Crime and Narcotics 24.12
 Transportation 16.2
 Air 16.7
 Aerodromes 16.8
 IFIA Upgrade 16.7
 Passenger movement 16.8
 Performance 16.7
 Infrastructure Development 16.3
 Bridge Programme 16.4
 Major Infrastructure Development Programme (MIDP) 16.3
 Montego Bay Perimeter Road Project 16.3
 South Coast Highway Improvement Project (SCHIP) 16.3
 Land 16.4
 Passenger Movement & Transit 16.4
 Traffic Management/Road Safety 16.4
 Licences – Public Passenger Services 16.5
 Performance 16.4
 Public Buses 16.4
 Maritime 16.5
 Logistic Hub Initiative 16.5
 Performance 16.6
 Trust Funds 2.10, 2.17
 Policies, Programmes and Legislations 16.3
 Civil Aviation (Amendment) Bill 16.3
 National Transport Policy 16.3
 National Road Safety Policy 16.3
 Privatization of JRC 16.3
 Shipping Bill 2020 16.3

U

UK Blue Carbon Fund 2.18
Unemployment 21.6
UNIDROIT Convention 2.28
Utility Regulation 16.2
United Kingdom 2.18–2.19
United Nations Children’s Fund (UNICEF) 2.28–2.29
United Nations Development Programme (UNDP) 2.27
United Nations Education Scientific and Cultural Organization (UNESCO) 2.27–2.28
United Nations Environment Programme (UNEP) 2.28
United Nations Programme for HIV and AIDS (UNAIDS) 2.27
United Nation Population Fund (UNFPA) 2.29–2.30, 20.18
United States Agency for International Development (USAID) 2.19–2.21, 13.6
United States-Mexico-Canada Agreement (USMCA) 1.7
University of Technology, Jamaica (UTech) 4.6
University of the West Indies (UWI) 4.6, 22.13
Urban Development Corporation (UDC) 14.5
Utility Regulation 15.2,16.2

V

Victims 24.8
Victim Services Unit 24.20
Vision 2030 Jamaica – National Development Plan 2.1 xiii
Voluntary Returning Residents 20.14

W

Waste Management 3.6, 3.15–3.16, 25.19
Water Resource Management 3.6, 3.14
Water
 connections 15.17
 consumption 15.16
 non-revenue water 15.16
 policies and programmes 15.12
 production 15.16
 projects 15.15
 revenue 15.17
Web GIS 3.24
West Lands Development 14.8
Wholesale and Retail Trade: repair and instillation of machinery (WRTRIM) 5.5
Wholesale and Retail Trade
 performance 19.6
 policy and regulation 19.2
 Initiatives for Men 25.17
 Adolescent Mothers 25.18
 Education and Research 25.18
Work permits 21.7
Works Portfolio 14.2
WINDALCO 11.4, 11.5
World Trade Organization 1.2, 1.6

Y

Youth 25.9

**ECONOMIC AND
SOCIAL
SURVEY
JAMAICA
2020**

Published by

