



## **Update on Jamaica's Development Results**

*Under*

### **Vision 2030 Jamaica – National Development Plan**

Summary Report on Performance 2009/10 –2020/21

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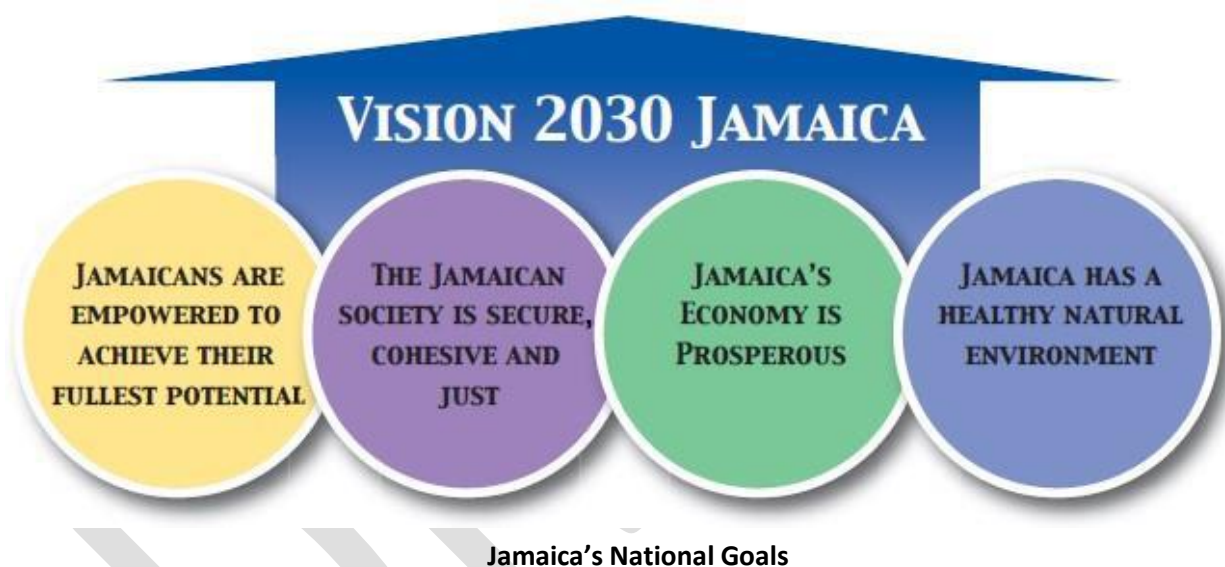
*May 2021*

**“Jamaica, the place of choice to live, work, raise families, and do business”**

## Background and Introduction

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Vision 2030 Jamaica – National Development Plan (NDP) is Jamaica’s first long-term national development plan, which covers the 21-year period 2009 – 2030. The Plan presents a strategic roadmap for Jamaica to achieve developed country status by 2030; and is now in its 13th year of implementation (FY2009/10—FY2021/22). This development will be sustainable and inclusive, engaging all Jamaicans in the plan design and implementation processes and providing equitable opportunities to all Jamaicans to benefit from development. Vision 2030 Jamaica is built on a results-based management framework, comprising 4 goals, 15 national outcomes and a strategic and operational framework geared towards the achievement of the goals and outcomes. The achievement of the goals and outcomes is embodied in the Vision Statement ***“Jamaica, the place of choice to live, work, raise families and do business”***.



The Vision 2030 Jamaica Plan Design and Implementation Process has been highly participatory and is stakeholder driven. The plan development process was launched in 2007; and implementation of Vision 2030 Jamaica commenced in 2009 with the launch of the NDP Document and the first successive 3-year Medium Term Socio-Economic Policy Framework (MTF), which covered fiscal years 2009/2010 – 2011/2012. The MTF is the strategic policy framework for the implementation of Vision 2030 Jamaica. Each MTF embodies a medium-term strategic programme to advance the implementation of the NDP, based on evidence, and the long-term goals and outcomes and guiding principles articulated in the Plan. In June 2017, Cabinet approved the Road Map for SDG Implementation in Jamaica, which identified Vision 2030 Jamaica and particularly the MTF as the national development plan framework for advancing the “implementation” of the SDGs in Jamaica. Accordingly, the MTF presents the alignment of the SDGs with the National Goals and Outcomes as well as alignment of the SDG Targets with the National and Sector Strategies and associated programmes/projects. The implementation of

Vision 2030 Jamaica and the SDGs is operationalized through alignment of strategic and operational planning – across sectors, development partners/actors and at the national and local levels of development – with the MTF. This includes alignment of strategic and corporate and operational planning in Ministries, Departments and Agencies (MDAs) as well as the private sector, civil society and academia, with the MTF. It also includes the alignment of parish Local Sustainable Development Plans (LSDPs) and community development plans with the MTF. The alignment of the country development frameworks and programmes of international development partners (IDPs) with the MTF has been demonstrated to improve coordination of development financing, technical support and expected development results around national priorities. This alignment has also facilitated coherence in approaches to advance the achievement of national goals and outcomes under Vision 2030 Jamaica and the global Sustainable Development Goals (SDGs).

The Vision 2030 Jamaica Plan Implementation process is inclusive and touted to be a best practice in development planning in Latin America and the Caribbean. The Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica (PIOJ), plays the main role in coordination and monitoring and evaluation (M&E) of the implementation of the Plan. The PIOJ coordinates Thematic Working Groups (TWGs) that form a critical tenet of the institutional arrangements for M&E of plan implementation and development performance. These TWGs have been stated to be a best practice model for participatory and stakeholder led development by regional and international development partners.

Progress towards the achievement of planned development results under Vision 2030 Jamaica is measured through use of national outcome indicators aligned to the 4 goals and 15 national outcomes. Performance against targets associated with the indicators signal the extent to which the implementation of strategic priorities under Vision 2030 Jamaica is achieving the intended results. For MTF 2018-2021, 75 indicators – 8 more than the 67 indicators utilized for MTF 2015-2018 – are being utilized to assess progress towards achieving medium term targets and advancement towards the 2030 targets and goals. ***The progress reports under Vision 2030 Jamaica represent the only space nationally that allows for the reporting on the overall development progress of Jamaica – that is social, economic, environmental and governance spheres of development.***

## Jamaica's Development Results 2009/10 - 2020/21 – Assessing our Country's Performance

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Fiscal year (FY) 2020/21 marked twelve (12) years of implementation of Vision 2030 Jamaica - NDP through successive MTFs. This assessment of the national development results takes place at the end of the implementation period of MTF 2018-2021, which is end of March FY 2020/21. Similar to previous MTFs, targets are set that coincide with the end of the period covered by one

MTF and the start of the period covered by the next. Therefore, for MTF 2018-2021, both the 2018 and 2021 targets are applicable. Development progress is measured against these targets based on the latest available data. This report shows development progress relative to the 2018 target for indicators with data available up to 2018 and against the 2021 target for indicators with data available for 2019, 2020 and 2021. The assessment of the development results are done on a quarterly basis and updated as data become available.

## *Development Performance relative to the 2018 targets*

Based on the national outcome indicator and target framework, the country's development progress under successive MTFs (2009-2012, 2012-2015, 2015-2018 and 2018-2021) has been mixed. Jamaica has experienced notable developments gains across all four (4) goals. Some of the advances made to date include:

- Human capital development including literacy rates at the grade 4 level
- Macroeconomic stability
- Economic growth in some industry structures particularly tourism and manufacturing
- Reduction in unemployment
- Increases in the use of non-fossil fuel based energy such as alternatives and renewables
- Governance, particularly in government effectiveness
- Infrastructural development

An assessment of the period also shows development challenges as well as development losses in some areas. Over the 12-year period, there has been low levels of economic growth, a general increase in the rate of chronic non-communicable diseases (NCDs), and a fall in environmental sustainability. There were also undesirable levels of poverty and crime although a trend of improvement in both areas was observed. There was noticeable development recovery in the national poverty prevalence, child and food poverty after earlier losses associated with the effects of the 2008 global financial crisis. There was also a trend improvement in the rate of serious crimes (Category 1 Crimes) with the 2018 target met and improvement over baseline for the murder rate which has fluctuated over the period of Plan implementation.

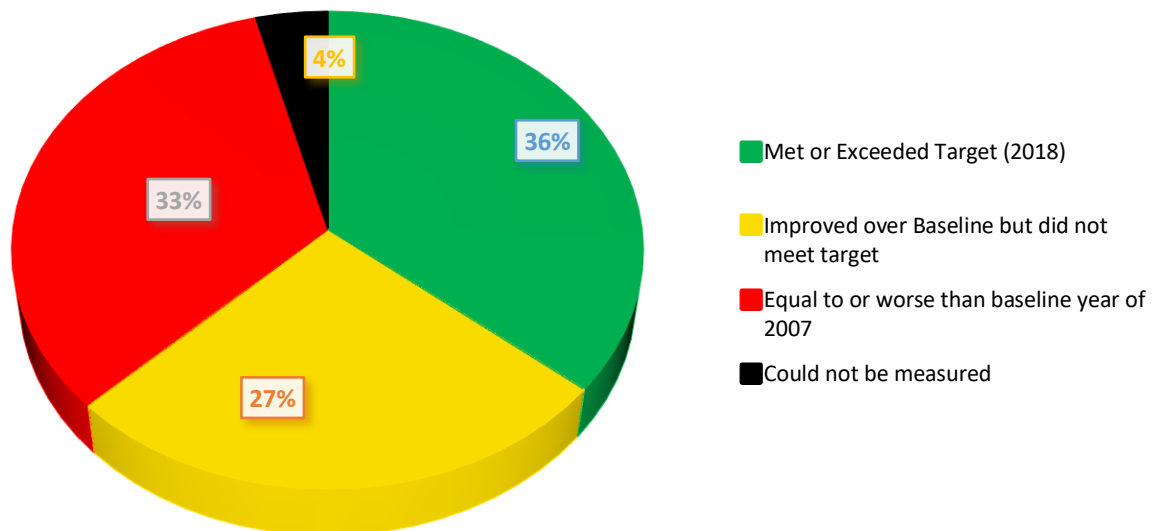
A summary of the progress made under the framework of national outcome indicators and targets for the Vision 2030 Jamaica – National Development Plan indicates that of a total of 75 indicators, about 62.7 per cent have shown improvement over the baseline year 2007 while approximately 33.3 per cent showed no improvement or worsened relative to the baseline year of 2007.

This can be further broken down as follows:

- 36 per cent of the Vision 2030 Jamaica targets were met or exceeded

- 26.7 per cent of the indicators showed some improvement over the baseline year 2007
- 33.3 per cent of the indicators showed no improvement or worsened compared to the baseline year 2007
- 4 per cent of the indicators could not be compared in this way due to lack of agreed targets for the relevant period

## JAMAICA'S DEVELOPMENT RESULTS: 2018 TARGETS



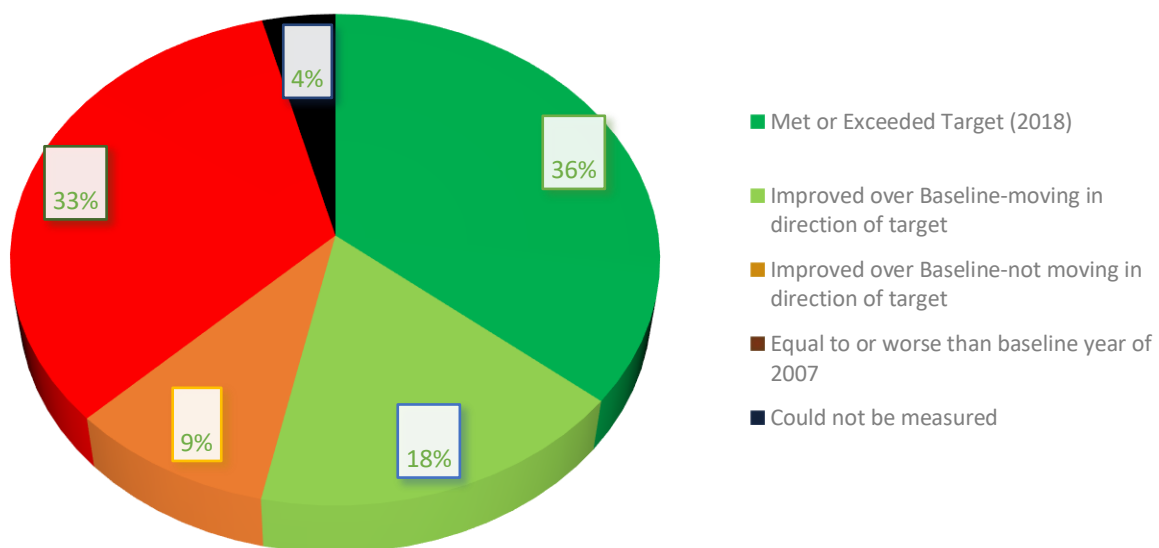
## Analysis of Indicators Improving over the Baseline but not Meeting Target

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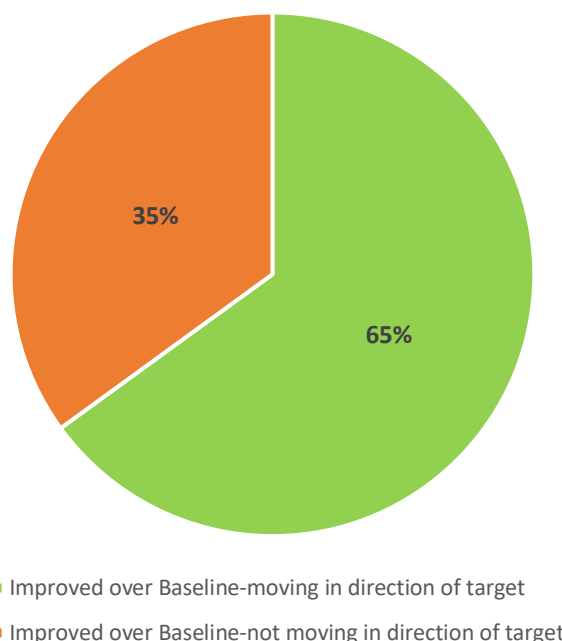
A further disaggregation of the 26.7 per cent of indicators that have improved over the baseline (see pie charts below) shows that:

- 65 per cent (18 per cent of total number of indicators) improved over the baseline and are moving in the direction of the target. Some of these indicators include:
  - Voice and Accountability Index
  - Agriculture Production Index
- 35 per cent (9 per cent of total number of indicators) improved over the baseline but are not moving towards meeting targets. Some of these indicators include:
  - Control of Corruption Index
  - Grade 4 literacy rate – (Total/both sexes)

### JAMAICA'S DEVELOPMENT RESULTS: 2018 TARGETS



### Breakdown of Indicators Showing Improvement Over Baseline 2007 But Not Achieving the 2018 Target



### Analysis of Indicators Remaining Same as Baseline (2007) or Worsening

Of the 75 indicators, 33.3 per cent showed no improvement or worsened relative to the baseline year of 2007.

An examination of these changes showed that:

- Regarding health, the unconditional probability of dying between the ages of 30 and 70 from cardiovascular diseases, cancer, diabetes, or chronic respiratory diseases has worsened relative to the 2007 baseline, increasing to 20.1 per cent in 2015 up from 17 per cent in 2007.
- In the area of Education and Training, the attendance rates at the early childhood and primary levels and the secondary level enrollment rate are areas of concern as they registered rates which were

Indicator- Attendance/Enrolment Rates	Baseline (2007)	Value (2018)	Target (2018)
Early Childhood (Attendance)	76.6	73	85
Primary (Attendance)	83.1	82.8	86.8
Secondary (Enrolment)	82.7	79.2	84.9

below the baseline year of 2007.

- According to the 2020 Doing Business Report, Jamaica is ranked 71<sup>st</sup> on the Ease of Doing Business Ranking. With this performance, Jamaica has missed the 2018 target rank of 52 and remains worse than the 2007 baseline rank of 50. Despite the fall in rank, Jamaica recorded an increase in the doing business score to 69.7, up from 68.3 for 2019.<sup>1</sup> The increase in the score reflects improvements to the regulatory environment while the fall in rank indicates that other countries are implementing global good practices at a faster pace.
- For 2018, the proportion of households with access to secure tenure was recorded at 75.3 per cent, which was below the 2007 baseline year of 80.5 per cent. This is one of the main indicators measuring progress under National Outcome #15 Sustainable Urban and Rural Development.
- Regarding the environment, Jamaica's score on the Environmental Performance Index fell from 77.02 in 2016 to 58.58 in 2018 and then to 48.2 in 2020.

### Analysis of Indicators that Met or Exceeded Targets

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Some of the main highlights from an examination of the indicators which met or exceeded the Vision 2030 Jamaica medium-term targets are:

- The majority of the indicators which met or exceeded the Vision 2030 Jamaica targets relate to Goals #1 and #2 which focus primarily on social development and Goal #3 which focuses mainly on economic development.
- With respect to National Outcome #1, A Healthy and Stable Population, targets for life expectancy (total, male and female) and population growth rate were achieved. Regarding National Outcome #2, World Class Education and Training, targets for adult literacy (male) and grade 4 literacy (male, female) were met.
- Under National Outcome #3, Effective Social Protection, the 2018 targets for national poverty rate, child poverty and national food poverty prevalence were all achieved.
- Concerning governance, covered under National Outcome #6, Effective Governance, the targets for government effectiveness and case clearance rate were achieved.
- In the economic area, under National Outcome #7 – A Stable Macroeconomy – targets for debt to GDP ratio and nominal GDP per capita were achieved. The 2018 target for the average annual unemployment rate, an indicator under National Outcome #8, An Enabling Business Environment, was surpassed. The out-turn for 2018 of 9.1 per cent, the

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<sup>1</sup> Over the years, the Doing Business Report has adjusted all its indicator sets. For example, in Doing Business 2017, new measures of post filing processes were introduced for paying taxes. Each methodology change was recalculated for one year to provide comparable indicator value and scores for the previous year. Changes made year over year in the number of economies, number of indicators and methodology affect the comparability of prior years.



lowest rate ever recorded in the country up to that point, exceeded the 2018 target of 10.6 per cent. Additionally, the 2018 target for the infrastructure index, which is a measure of the state of the economic infrastructure in the country, was also achieved.

- Notably, most of the indicators tracking development gains in the tourism sector exceeded their respective targets. These are:
  - Percentage change in foreign exchange earnings from tourism
  - Percentage change in visitor arrivals (stopover)
  - Percentage change in the number of persons employed in the accommodations sector

## Summary of Performance by the National Goals

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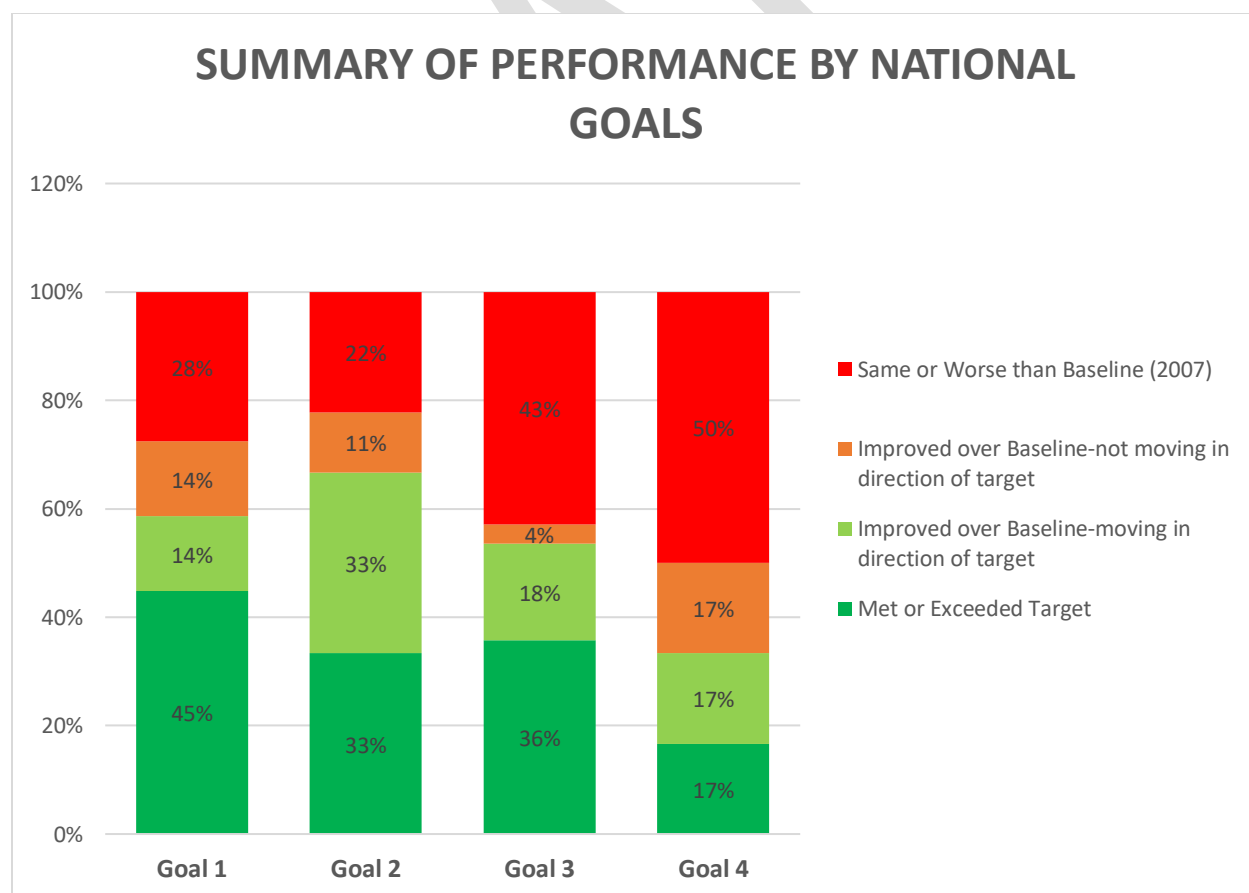
A summary of performance by National Goals shows that:

- Development gains were made under all four goals evidenced by the achievement of some 2018 targets across all. Where 2019 data were available, some indicators showed progress towards achieving 2021 targets. Additionally, there were indicators which showed movements towards meeting their respective targets.
- With respect to Goal #1, “Jamaicans are Empowered to Achieve their Fullest Potential, gains were made in the area of social protection particularly poverty, including child poverty and national food poverty prevalence. Gains were also made in the areas of health and population with improvements in life expectancy and educational outcomes related to literacy. Some of the areas of concern relate to an increase in the burden of chronic non-communicable diseases (NCDs), the attendance rate at the primary level of the educational system, and gross enrolment rate at the secondary and tertiary levels of education.
- Under Goal #2 “The Jamaican Society is Secure, Cohesive and Just”, gains were made in the areas of security and safety and effective governance. With respect to security and safety, a reduction in the overall rate for serious crimes was largely responsible for modest gains in this area. Regarding effective governance, the country recorded positive performance on key international governance indicators such as voice and accountability and government effectiveness. Progress was also made in the area of justice, evidenced by an increase in the case clearance rate.
- With respect to Goal #3, “Jamaica’s Economy is Prosperous”, much of the development gains were attributed to improvements in the macroeconomy with the achievement of targets for nominal GDP per capita and the debt-to-GDP ratio. There was also progress in some of the country’s main industry structures, such as tourism and agriculture where targets were either met or narrowly missed. Gains were also noted in the business environment with a fall in unemployment. Notwithstanding these areas of positive





performance, the results show lower than targeted rates of economic growth and the need to advance improvements in the ease of doing business and enhancing international competitiveness for our main industry structures.

- Under Goal # 4, “Jamaica has a healthy natural environment”, the country recorded a fall in performance on the Environmental Performance Index (EPI), a key international index measuring countries’ environmental performance in the areas of Ecosystem Vitality and Environmental Health. Rural poverty and the percentage of households with access to secure tenure remain concerns for the country.



The following chart shows the summary of performance under each of the four (4) national goals.



## Summary of Indicators by Performance against Targets and Baseline

Traffic Signal	No. of Indicators	%	Examples of Selected Indicators
Green 	27	36%	Goal 1: Life expectancy at birth, Population growth rate, Grade 4 literacy rate (male), Grade 4 literacy rate (female) Goal 2: Government Effectiveness Index, Case Clearance rate Goal 3: Infrastructure Index, Percentage change in foreign exchange earnings from tourism, # of scientific publications Goal 4: Hazard damage as a percentage of GDP
Yellow 	20	26.7%	Goal 1: Human Development Index, Percentage of labour force that is certified, Grade 4 Numeracy Rates-both sexes Goal 2: Control of Corruption Index, Rule of Law Index, Voice and Accountability Index Goal 3: Fiscal balance as a percentage of GDP (Fiscal Year), Energy intensity index, Resident patent filing, Agriculture production index, Goal 4: Number of parishes with Sustainable Development Plans not older than 5 years, Housing quality index
Red 	25	33.3%	Goal 1: Maternal Mortality Ratio, Percentage of PATH beneficiaries in consumption quintiles 1 and 2, Use of Cultural Resources Index Goal 2: Regulatory Quality Index Goal 3: Ease of Doing Business Ranking, Growth rate of services (Financing and Insurance and Real Estate and Business Services), Travel and Tourism Competitiveness Index Goal 4: Proportion of households with access to secure tenure, and Environmental Performance Index (EPI)
Grey 	3	4%	Goal 1: Population ratio (physicians, nurses and mid-wives) per 1000 population Goal 2: Percentage change in export earnings from the bauxite industry Goal 3: Percentage of Renewables in electricity generation
TOTAL	75	100%	
<p><u>Traffic Signals (based on results up to September 2020):</u></p> <p>Green - Met or exceeded target (2018)</p> <p>Yellow - Improved over baseline year of 2007 but did not meet target (2018)</p> <p>Red - Equal to or worse than baseline year of 2007</p> <p>Grey - Not applicable</p> <p>Note: Measurement of the national development results is against 2021 targets for indicators with 2019 data and against 2018 targets for indicators with data up to 2018.</p>			

## Summary: Indicators showing improvement over baseline but not achieving target

Traffic Signal	No. of Indicators	%	Examples of Selected Indicators
Lime Green 	13	65%	Goal 1: Adult Literacy Rate (15 and over) – Female, Human Development Index Goal 2: Voice and Accountability Index, Rule of Law Index Goal 3: Fiscal balance as a percentage of GDP, Energy Intensity Index, Resident Patent Filing, Agriculture Production Index Goal 4: Housing Quality Index,
Burnt Orange 	7	35%	Goal 1: % of students sitting CSEC exams passing 5 or more subjects including English Language and/or Math, Grade 4 literacy rates-both sexes Goal 2: Control of Corruption Index Goal 3: % change in visitor arrivals (cruise) Goal 4: Number of parishes with sustainable development plans not older than 5 years
TOTAL	20	100%	
<u>Traffic Signals (based on results up to September 2020):</u> Lime Green - Improved over the baseline and moving in the direction of the target Orange - Improved over the baseline but showing declining trends or growing at a declining rate			

## Development Results against 2021 Targets

Based on data for 2019 and 2020, Jamaica has already achieved and in some cases surpassed several 2021 targets including targets for Population Growth; Secondary Level Enrolment Rates; Case Clearance Rate; and Annual Inflation Rate (see table below).

Indicator	Baseline	Value	Target (2021)
Population Growth Rate	0.3	0 (2019)	0
Secondary Level Enrolment Rate	94.4	107.6 (2019)	98-100
Case Clearance Rate	93.8	96.6 (2020)	95
Annual Inflation Rate	16.8	5.2 (2020)	4-6

Regarding the environment, Jamaica's score on the Environmental Performance Index fell from 58.58 in 2018 to 48.2 in 2020, further away from the 2021 target of 60.2.

### *Impact of COVID-19 on national Development Results Based on Preliminary Data*

Notwithstanding these successes, there have been development slippages due largely to the impact of the COVID-19 pandemic. While the measures employed locally to curb the spread of the virus and the ongoing vaccination programme have yielded positive outcomes, the pandemic has negatively impacted development, particularly in the social and economic areas. Disruptions in economic activity in key industries have stymied economic growth and contributed to the loss of jobs and reduced work hours across several industries. The extent and nature of social dislocation will be more clearly defined as more data become available.

Specific development losses/slippages include:

- For 2020, the average unemployment rate increased to 10.2 per cent, up from 7.7 per cent for 2019.
- Real GDP declined by 9.9 per cent for the calendar year 2020.