



Report on Jamaica's Development Progress towards its 2030 Goals (Update)

Prepared by the Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica (PIOJ)

December 2021

This report covers development progress towards the achievement of the National Outcomes and consequently Goals of Vision 2030 Jamaica. Specifically, it reports on the monitoring of the National Outcome Indicators and measurement of development performance against a baseline year of 2007 and medium-term (interim) targets that serve as milestones toward the achievement of the 2030 targets. Data available up to December 2021 were utilized.

Progress is indicative of the extent to which the planned outcomes of the implementation of strategic development actions under Vision 2030 Jamaica have been achieved. These strategic development actions have been aligned to the medium-term sector strategies (that advance national strategies) in 4 successive MTFs to date: MTFs 2009-2012, 2012-2015, 2015-2018 and 2018-2021. The development outcomes from programmes are typically not experienced immediately but in the medium to long term, and therefore on-going monitoring and evaluation (M&E) is required to identify the effectiveness of strategies.

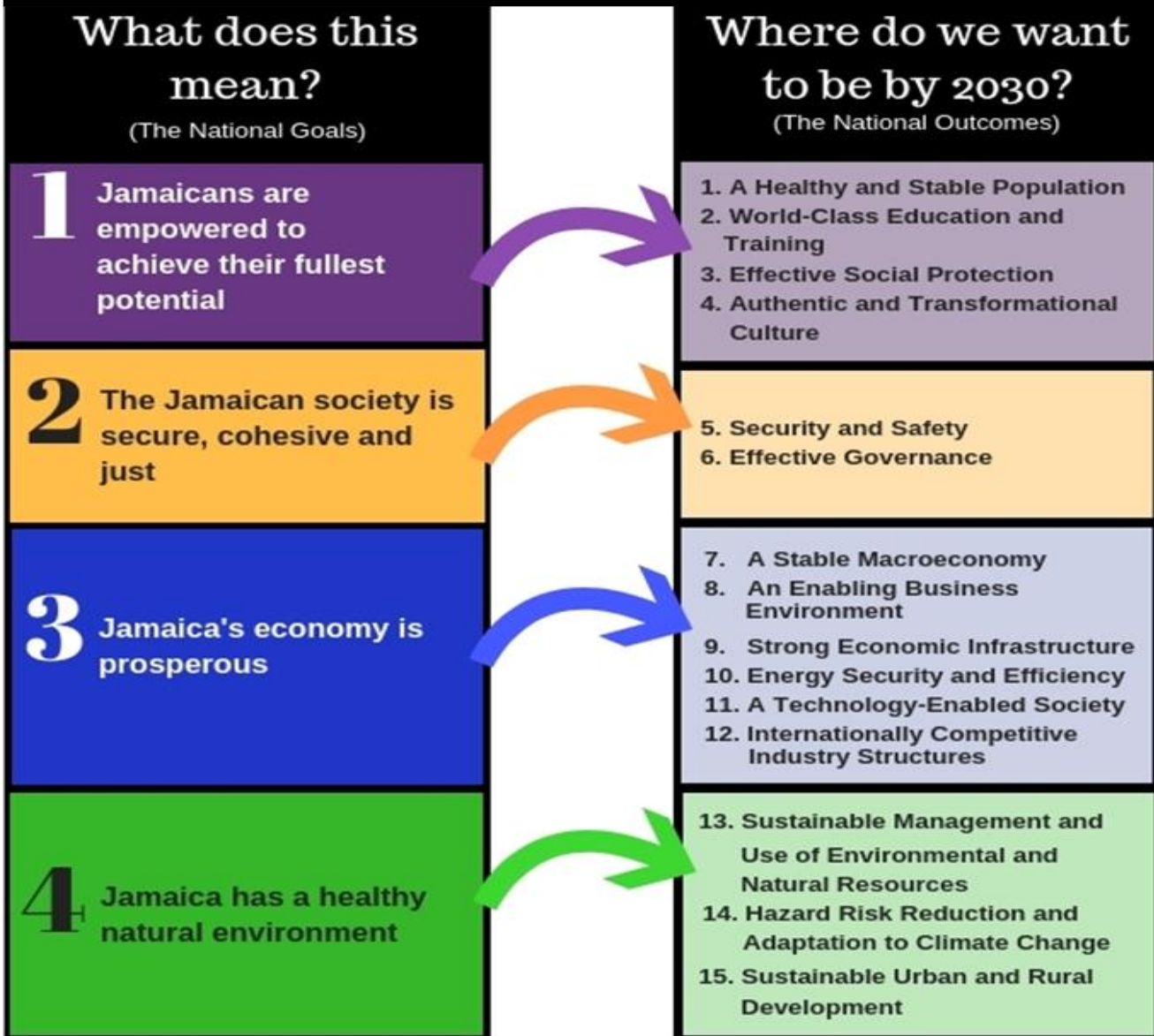
Note that the development outcomes from programmes and projects are mediated by the development environment and cross-sectoral factors, including: the availability of required resources and resource allocation; institutional strengthening and systems capacity; and capacity and competencies for strategic planning, policy and evidence- and results- based management (ERBM) as well as existing plans, policies and strategies and ERBM processes such as Medium Term Results-Based Budgeting (MTRBB) and monitoring and evaluation (M&E).

The Sustainable Development Goals (SDGs) are being implemented through Vision 2030 Jamaica. Accordingly, in Medium Term Socio-Economic Policy Framework (MTF) 2018-2021, the SDGs are aligned to the National Goals and Outcomes and the SDGs Targets are aligned to the National and Sector Strategies for development action. Hence, progress reporting on the Outcomes of Vision 2030 Jamaica, can be mapped to country advancement of the SDGs.

Where Do We Want to be by 2030?



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



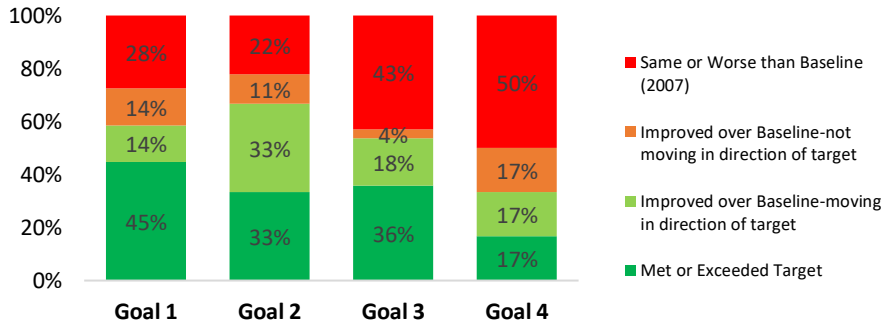
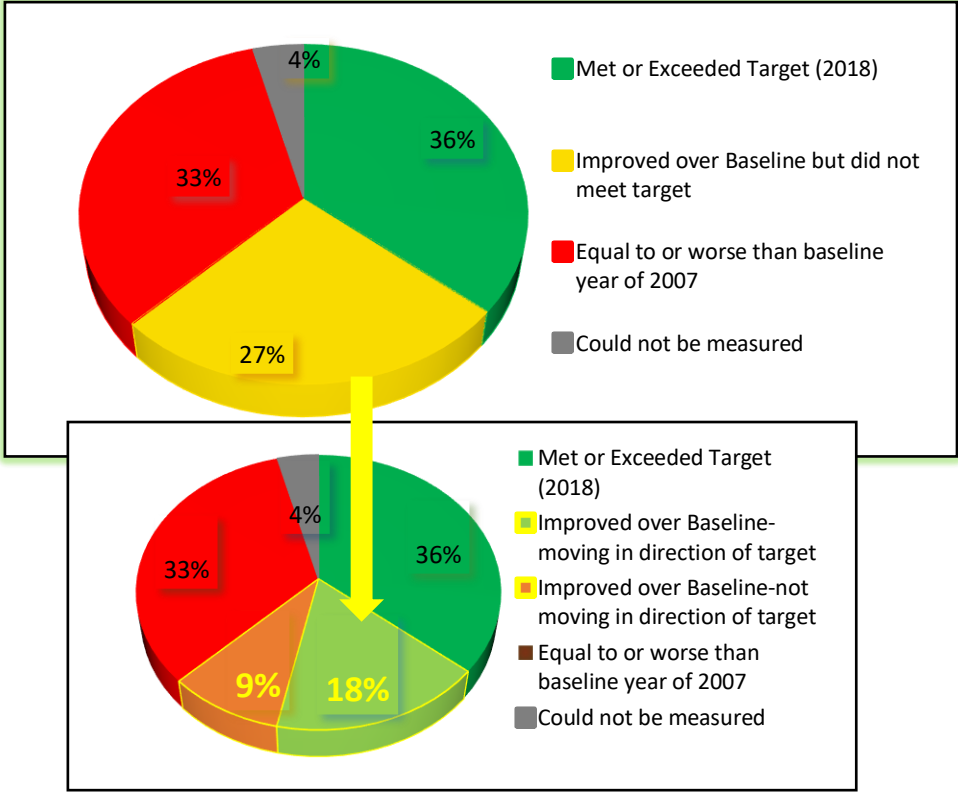
Jamaica's Development Results – 2009-2021

Overview

<p>Performance across all 4 Goals and 15 National Outcomes</p>	<p>Based on the national outcome indicator and target framework, the country's development performance has been mixed. Development gains were made under all four goals evidenced by the achievement of some 2018 targets and improvement in some indicators that fell short of targets. Where 2019 and 2020 data are available, some indicators showed progress towards achieving 2021 targets. There were also development losses with some indicators showing slippages or no change from the baseline 2007.</p> <p>Data for 2020 is currently unavailable for several indicators. Therefore, the much-anticipated monitoring of the early effects of COVID-19 on development progress is not comprehensively treated in this report and hence, greater focus is given to the pre-COVID situation. In some respects, we can treat performance up to 2019 as our pre-COVID baseline. Greater focus will be given to the post-COVID situation in the next report.</p> <p>Development trends and main highlights: There has been notable progress towards achieving the goals and outcomes of Vision 2030 Jamaica since Plan implementation commenced in 2009.</p>	
	<p style="text-align: center;">Development Gains (Pre-COVID, select)</p> <ul style="list-style-type: none"> ▪ Human Capital Development ▪ Macroeconomic Stability ▪ Reduction in Unemployment ▪ Increases in the use of non-fossil fuel-based energy such as alternatives and renewables ▪ Improvement in governance, particularly in government effectiveness ▪ Improvement in delivery of justice services – case clearance ▪ Economic growth in some industry structures particularly tourism and agriculture ▪ Decreases in national, child and food poverty – change from increases in the poverty rate associated with the 	<p style="text-align: center;">Development Challenges (Pre-COVID, select)</p> <ul style="list-style-type: none"> ▪ Low levels of economic growth ▪ Insufficient competitiveness and earnings in some key sectors ▪ A general increase in the rate of chronic non-communicable diseases (NCDs), ▪ A fall in environmental sustainability ▪ Undesirable rate of recidivism ▪ Lower than targeted improvement in security of tenure ▪ Lower than targeted number of Local Sustainable Development Plans (LSDPs)

effects of the 2008 global financial crisis

- Decreasing trend of serious crimes, although the rates remain undesirable.



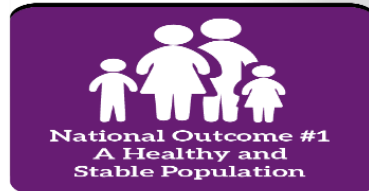
Development Progress against 2018 Targets. Currently, 75 indicators are being monitored to measure progress towards medium-term and 2030 development outcomes.

Report on Jamaica's Development Results by Goal – 2009-2021

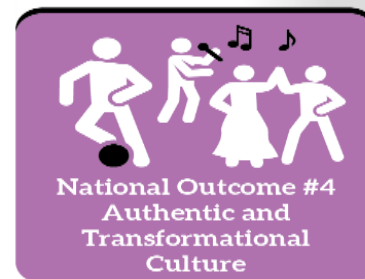
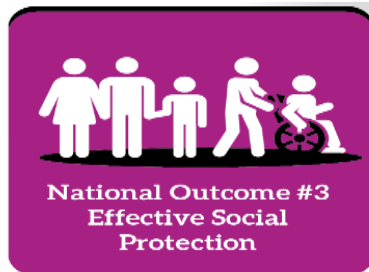
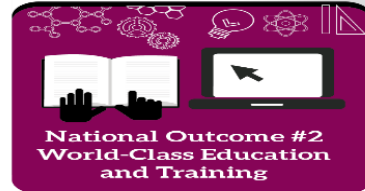
Goal 1: Jamaicans are Empowered to Achieve their Fullest Potential



VISION 2030 JAMAICA GOAL 1 Jamaicans are empowered to achieve their fullest potential



VISION 2030 JAMAICA GOAL 1 Jamaicans are empowered to achieve their fullest potential



Synopsis of development results:

There have been development gains in the areas of population, health, and education with improvements in life expectancy and educational outcomes related to literacy, among others. While the total life expectancy remained above baseline and target, this was owing to values recorded for females. Life expectancy for males was below the baseline 2007 value, based on the 2011 Population and Housing Census and intercensal estimates.

Jamaica progressed from the intermediate to the advanced stage of the demographic transition. The size of the working age population (14-64 years) has proportionally been at its largest, providing the country with an opportunity to reap a demographic dividend/bonus.

The population growth rate consistently decreased over the period and accelerated beyond projections to achieve the 2030 target of zero (0) population growth in 2017. This was owing largely to higher than projected external migration. The zero (0) growth rate was maintained in 2018 through to 2020. The stability of this rate is being monitored along with the rates for the dynamics of fertility, mortality and migration, and the consequent population structure and size, to inform policy and planning. The characteristics and composition of the population have far-reaching implications for planning, including resilience-building and policy responses within crisis, such as the COVID-19 pandemic.

	<p>Gains have also been made around social protection, particularly poverty, including child poverty and national food poverty prevalence with the medium-term 2018 targets met and performance trending towards the 2021 target.</p> <p>The country’s Human Development Index (HDI) score has consistently trended toward target. Jamaica remained 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 in 2019 – a value of 0.734 was also recorded for 2017 and 2018. However, the county fell an average of two places in its ranking over the period 2014-2019.</p> <p>There has also been moderate improvement in student performance in key national examinations at various levels, since 2009.</p> <p>Some of the areas that performed below the 2018 target are: increase in the burden of chronic non-communicable diseases (NCDs); lower than targeted performance in the child numeracy rate, the gross enrolment rate at the tertiary level of education, and attendance rates at the early childhood, primary and secondary levels of education. Tertiary level enrolment was below the 2007 baseline year, in 2017 and 2018. Strategic programmes to advance progress towards targets will be monitored, including, those intended to – strengthen health promotion and primary and other levels of health care; evidence- and results- based management processes for education and training, access to technology devices and services, the quality of curricula and equity in access to quality education and training, and school-to-work transition, among other areas.</p>		
	<table border="1"> <tr> <td data-bbox="411 1245 948 2018"> <p>Development Trends</p> <p>Jamaica advanced from the intermediate to advanced stage of the demographic transition. The working age population is proportionally the largest age group (<i>thereby reducing the dependency ratio and offering an opportunity to reap a demographic dividend</i>) and the population growth rate is zero (0).</p> <p>The poverty rates have been recovering, after increasing during the heights of the impacts of the global financial crisis.</p> <p>With the exception of literacy rates, educational participation and outcomes while not performing within the range to cause alarm have been</p> </td> <td data-bbox="948 1245 1410 2018"> <p>Main Highlights</p> <p>Jamaica achieved the 2030 target of 0 per cent for the population growth rate, in 2017.</p> <p>In 2018, Jamaica recorded a poverty rate of 12.6 per cent, the lowest since 2008</p> <p>Relatively high total life expectancy rate – with steadily increasing rate for females; and</p> </td> </tr> </table>	<p>Development Trends</p> <p>Jamaica advanced from the intermediate to advanced stage of the demographic transition. The working age population is proportionally the largest age group (<i>thereby reducing the dependency ratio and offering an opportunity to reap a demographic dividend</i>) and the population growth rate is zero (0).</p> <p>The poverty rates have been recovering, after increasing during the heights of the impacts of the global financial crisis.</p> <p>With the exception of literacy rates, educational participation and outcomes while not performing within the range to cause alarm have been</p>	<p>Main Highlights</p> <p>Jamaica achieved the 2030 target of 0 per cent for the population growth rate, in 2017.</p> <p>In 2018, Jamaica recorded a poverty rate of 12.6 per cent, the lowest since 2008</p> <p>Relatively high total life expectancy rate – with steadily increasing rate for females; and</p>
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	<p>performing below target and are cause for concern. Child numery rates and gross enrolment at the tertiary level are of particular concern.</p>	<p>while fairly high, lower than the baseline 2007, for males.</p> <p>Jamaica continued to rank among countries in the 2nd tier High Human Development category on the Human Development Index. In 2019, Jamaica’s maintained its 2017 and 2018 HDI value of 0.734 – the highest score since 1990 when the ranking commenced.</p>
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Goal 2: The Jamaica Society is Secure, Cohesive and Just



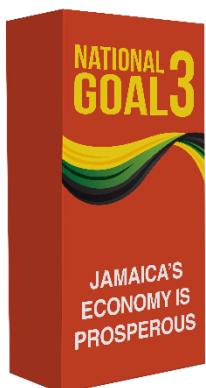
Synopsis of development results:

Development gains have been made in the areas of safety and security and effective governance, although performance in most areas is below what is desirable and/or targeted. With respect to safety and security, there has been a downward trend in the rate of serious crimes (with fluctuations), with the 2018 target achieved. The rates for 2019 and 2020 (206.5 per 100,000 population) show movement towards the 2021 target and are lower than the 2007 baseline. The 2020 rate is the lowest since 2007. While there have been fluctuations in the murder rate, the rate has remained fairly constant (within a range) and below the baseline 2007 value for most years. The murder rate decreased in 2019 over the 2018 rate but showed an increase in 2020 over the 2019 rate. The rate of recidivism continued to perform below target.

Regarding effective governance, there was positive performance on key international governance indicators, with the country achieving the 2018 target for government effectiveness. However, the country has shown some slippages in government effectiveness in 2019 and 2020. Among the remaining governance indicators, voice and accountability, control of corruption and rule of law performed above baseline, although outside the range of their respective targets. The control of corruption index consistently improved above the baseline and recorded its highest value in 2020. The rule of law has remained above the 2007 baseline since 2011.

	<p>However, there was slippage to the 2014 value in 2019, with noticeable recovery in 2020. Regulatory quality continued a downward trend with its lowest value of 0.09 recorded in 2020. It consistently performed below baseline with the highest value since 2007 (0.31) recorded in 2011 (0.29). Progress was recorded around justice, evidenced by a trend of increase (with fluctuations) in the case clearance rate, with the 2018 and 2021 target of 95 exceeded by values of 101.6 and 96.5 in 2019 and 2020 respectively.</p>	
	<p>Development Trends</p> <p>Reduction in serious crimes (Category 1 Crimes), including the murder rate to below the values for the baseline year, 2007 – although there were fluctuations during the period.</p> <p>Improvement in performance under international governance indicators. However, there is cause for concern owing to performance below target, fluctuations and slippages for some indicators and performance below baseline for the regulatory quality index.</p> <p>The Case Clearance rate showed a trend of improvement (with fluctuations) towards meeting/exceeding the target.</p>	<p>Main Highlights</p> <p>The major crime rate declined to 208.6 per 100,000 population in 2019 and to 206.5 in 2020 – the lowest throughout the period, including the 280 per 100,000 pop. recorded in the baseline year 2007. In 2020, the murder rate increased to 48.52 per 100,000 pop. from 45.88 in 2019 – this was lower than the murder rate of 59.5 per 100,000 pop. recorded in the baseline year 2007, though not the lowest as the lowest is 36.9 per 100,000 pop. recorded in 2014.</p> <p>The target for government effectiveness index was achieved in 2018.</p> <p>The Case Clearance Rate values of 101.6 in 2019 and 96.5 in 2020 exceeded the 2018 and 2021 target of 95.</p>

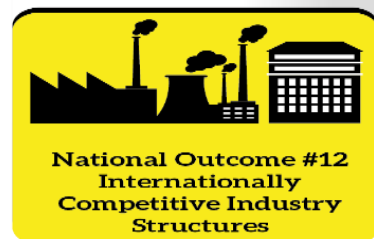
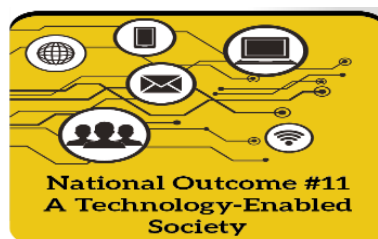
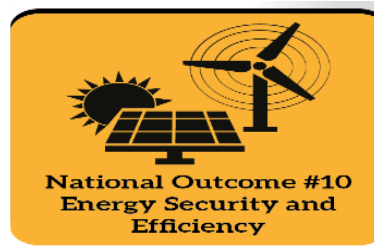
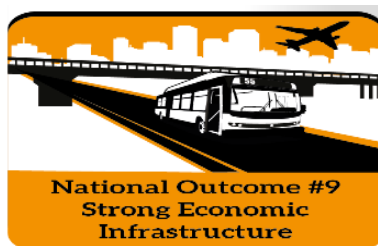
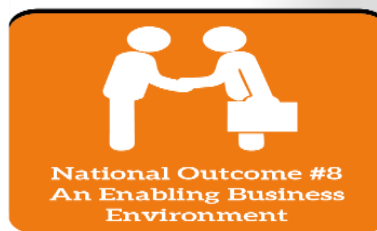
Goal 3: Jamaica's Economy is Prosperous



VISION 2030 JAMAICA GOAL 3
Jamaica's economy is prosperous



VISION 2030 JAMAICA GOAL 3
Jamaica's economy is prosperous



Synopsis of development results:

By the end of 2019, macroeconomic stability was entrenched evidenced by low and stable inflation; debt on a firm downward trajectory, seven consecutive years of economic growth; albeit low; and sufficient international reserves. The Jamaican labour market continued to improve with a record low unemployment rate in 2019 (averaging 7.7 per cent across the quarters¹) and a trend towards the target for labour market efficiency, albeit with fluctuations. In 2020, there were slippages in these indicators, except for inflation that was lower (showed gains) over 2019, with 5.2 in 2020 compared to 6.2 in 2019. The debt-to-GDP ratio surpassed 100 (110.1) percent after declining to below 100 in 2018 and 2019. However, it remained below the rates recorded in the heights of the effects of the 2008 global financial crisis. In 2020, the real GDP annual growth rate was -9.9, the highest rate of economic contraction since 2007, and the first contraction in growth since 2012. Also, the unemployment rate increased to 10.2 (annual average) in 2020.

¹ ESSJ, 2019. Planning Institute of Jamaica (PIOJ).

Note: The World Bank's Doing Business Index has been utilized as a globally comparable metric to assess the attractiveness of the Jamaican business environment relative to other countries. Jamaica's performance on the Index had shown moderate gains in the business environment reflected by improvements in the score of the Doing Business Index particularly due to the ease of starting a business in Jamaica. This is to be interpreted within a context of recovery after losses experienced due to the 2008 global financial crisis. However, on September 16, 2021 the World Bank announced the discontinuation of the Doing Business Report owing to challenges regarding data integrity. Hence, the Doing Business Index and data have been removed from the list of National Outcome Indicators and will not be reflected in subsequent updates on Jamaica's development performance.

The strengthening and modernization of key economic infrastructure such as road networks and highways as well as Information and Communications Technology (ICT) has provided support to economic sectors including transportation. The improvements made have contributed to Jamaica registering improved scores on the infrastructure index, a pillar of the Global Competitiveness Index (GCI). The country has also experienced improvements in energy efficiency and greater use of renewable sources of energy.

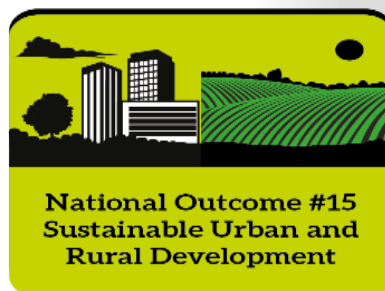
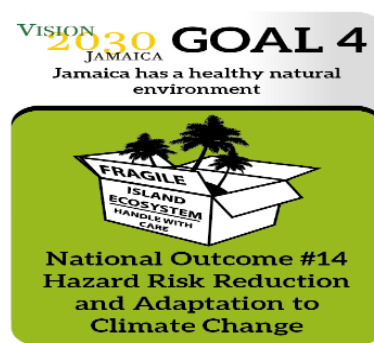
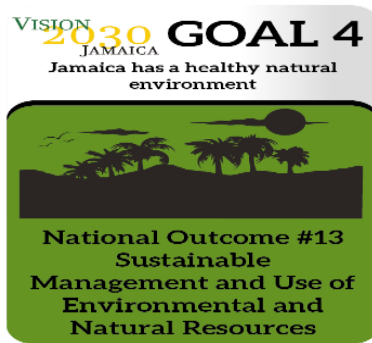
The performance for Technology Enablement was mixed. The Global Innovation Rank remained at 81 in 2019 and 2020, the lowest value throughout the period of Plan implementation, to date. The number of scientific publications met the 2018 target and was moving towards the 2021 target. The number of resident patent filings has performed above baseline but below target throughout Plan implementation.

There had also been progress in some of the country's main industry structures, such as tourism and agriculture where targets were either met or narrowly missed in the pre-COVID period (up to 2019). However, there have been post-COVID era declines in all industry structures for which 2020 data is available. The areas showing the most resilience in 2020 were agriculture, which remained in the general range of performance and manufacturing, which though showing a noticeable decline, showed a positive performance. The growth rate of services, earnings from bauxite, and earnings and other performance related indicators for tourism, all showed declines with negative values recorded in 2020.

Generally, the results show lower than targeted rates of economic growth, and low levels of growth and insufficient competitiveness for key industries in the pre- and post- COVID eras. The effects of COVID-19 on key economic indicators are evident. There is demonstrated need for further strides in building economic resilience; the business environment; logistics and value chain development and governance; science, technology, and innovation (STI); digitalization; and the competitiveness of main and emerging industry structures.

	<p>Development Trends</p> <p>Debt to GDP ratio on a firm downward trajectory up to 2019</p> <p>Annual inflation has been trending downwards</p> <p>Labour market improvements evidenced by a trend decline in unemployment since 2014 and record employment levels in 2019. However, there were slippages in 2020 owing to the effects of COVID-19.</p>	<p>Main Highlights</p> <p>Public debt fell below 100% of GDP in FY 2018/19 and FY 2019/20.</p> <p>At the end of December 2016, Jamaica’s inflation rate stood at 1.7 per cent, the lowest inflation rate the country had seen in more than 45 years.</p> <p>In 2019, record lowest unemployment rate of 7.7 (average); and highest average employment of 1 244 925 since 1968.</p> <p>The 2018 target for the number of scientific publications was met.</p> <p>Post-COVID declines in 2020, in the performance of key industry structures such as tourism; and demonstrated resilience in agriculture, and manufacturing (though to a lesser extent)</p>
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Goal 4: Jamaica has a Healthy Natural Environment



	<p>Synopsis of development results:</p> <p>The national outcomes for a healthy natural environment have shown mixed performance. There have been development gains in housing quality – Sustainable Urban and Rural Development – as the Housing Quality Index increased to 75.3 in 2018, from 71.5 in 2010 and 68.1 in the baseline year 2007. The country has consistently achieved targets for Hazard Damage as a percentage of GDP signaling that the costs of natural disasters during the period were not of a scale to cause calamitous/detrimental economic damage to the country.</p> <p>Jamaica recorded a trend decline in its performance under the Environmental Performance Index (EPI), a key international index measuring the state of the natural environment in the areas of Ecosystem Vitality and Environmental Health. The country has performed below baseline, except for 2016, where there was recovery above the baseline 2007 score of 74.7, with a score of 77.02. In 2018, Jamaica’s score on the EPI declined from the 77.02 recorded in 2016 to 58.58; and in 2020, the country recorded a further decline to 48.2, the lowest value over the period, including the baseline year, 2007. This performance pushed the country further away from meeting the 2030 target of an EPI higher than 80. The 2020 EPI showed declines in scores for both Environmental Health (45.5) and Ecosystem Vitality (50) compared with 2018 scores of 51.98 and 68.48 respectively.</p> <p>The country has not met its target regarding the number of Local Sustainable Development Plans (LSDPs) developed and/or no older than 5 years – LSDPs provide the framework for sustainable development at the Parish level. While the proportion of households with access to secure tenure has shown consistent performance between 70 -79 per cent, this has been below the target range of 82-88 for the period 2012-2018, and the 2007 baseline value of 80. The rate of rural poverty showed improvement with the 2018 value of 15 representing recovery equal to the baseline value. This represents a noticeable decline from increases associated with the negative effects of the 2008 global financial crisis. While there have been fluctuations in performance, the values for 2016-2018 have shown downward movement with the 2018 value meeting the 2021 target.</p>	
	<p>Development Trends</p> <p>A trend of decline in the EPI score with performance below baseline, except for 2016 where there was performance above baseline – this was not sustained in the EPI scores for 2018 and 2020. The lowest score was recorded in 2020.</p>	<p>Main Highlights</p> <p>Target for hazard damage as a percentage of GDP achieved.</p>

	<p>Undersirable rate of rural poverty. However, there has been downward movement for 2016-2018 from the increases associated with the 2008 global financial crisis. The 2018 value is equal to the baseline and lowest since 2009, when Plan implementation commenced.</p> <p>Progress towards the target for Housing Quality has been fairly consistent with values above the baseline 68.1 and falling within the range of the targeted 71-76, for the period 2012-2018, with values ranging from 72 to 75.</p> <p>The proportion of households with access to secure tenure has been consistently below the value for the baseline year, 2007, and target.</p> <p>The number of parishes with a completed Local Sustainable Development Plan (LSDP) that is no older than 5 years has consistently performed below target. While performance has been above the baseline of zero (0) in 2007, the number of up-to-date LSDPs has not exceeded 5 (2015).</p>	
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