



Update on Jamaica's Development Results

Under

Vision 2030 Jamaica - National Development Plan

Summary Report on Performance 2009/10 - 2017/18

December 2018

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

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Background and Introduction

Vision 2030 Jamaica - National Development Plan 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 10th year of implementation (FY2009/10–FY2018/19). 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 Plan Document and the first 3-year Medium Term Socio-Economic Policy Framework (MTF) for fiscal years 2009/2010 - 2011/2012. The MTF is the implementation mechanism for Vision 2030 Jamaica, with each MTF comprising a medium term strategic programme to advance the implementation of the National Development Plan, based on the nation's development aspirations and guiding principles as articulated in the plan.

Progress in the achievement of the goals and outcomes of Vision 2030 Jamaica is measured through use of national outcome indicators aligned to the 4 goals and 15 national outcomes. These indicators signal the extent to which the implementation of strategic priorities under Vision 2030 Jamaica is achieving the intended results. For MTF 2018-2021, 67 indicators - 20 more than the 47 indicators utilized for MTF 2015-2018 - were utilized to assess progress in meeting medium term targets and advancement towards the 2030 targets and goals.

The MTFs also guide the corporate and operational plans of Ministries, Departments and Agencies (MDAs) and was recently used as a foundation and strategic document in the work undertaken by the Economic Growth Council. As an inclusive process, touted to be the best practice in development planning in Latin America and the Caribbean, the Vision 2030 Jamaica Secretariat coordinates 12 Thematic Working Groups (TWGs) that are part of the monitoring and evaluation framework of Vision 2030 Jamaica.

The Vision 2030 Jamaica Secretariat plays the main role of monitoring and evaluating the implementation of the Plan and providing inputs on strategic direction. ***The progress reports 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.***

To advance progress and ensure buy in across all sectors - public, private, civil society, academia and IDPs - there continues to be a strong communications and social responsibility programme. In 2017/18 focus was placed on the development of the 4th medium term framework - which relied on participatory mechanisms for its development and review. This is not dissimilar to the development of previous MTFs.

Jamaica's Development Results 2009/10 - December 2018 - Assessing our Country's Performance

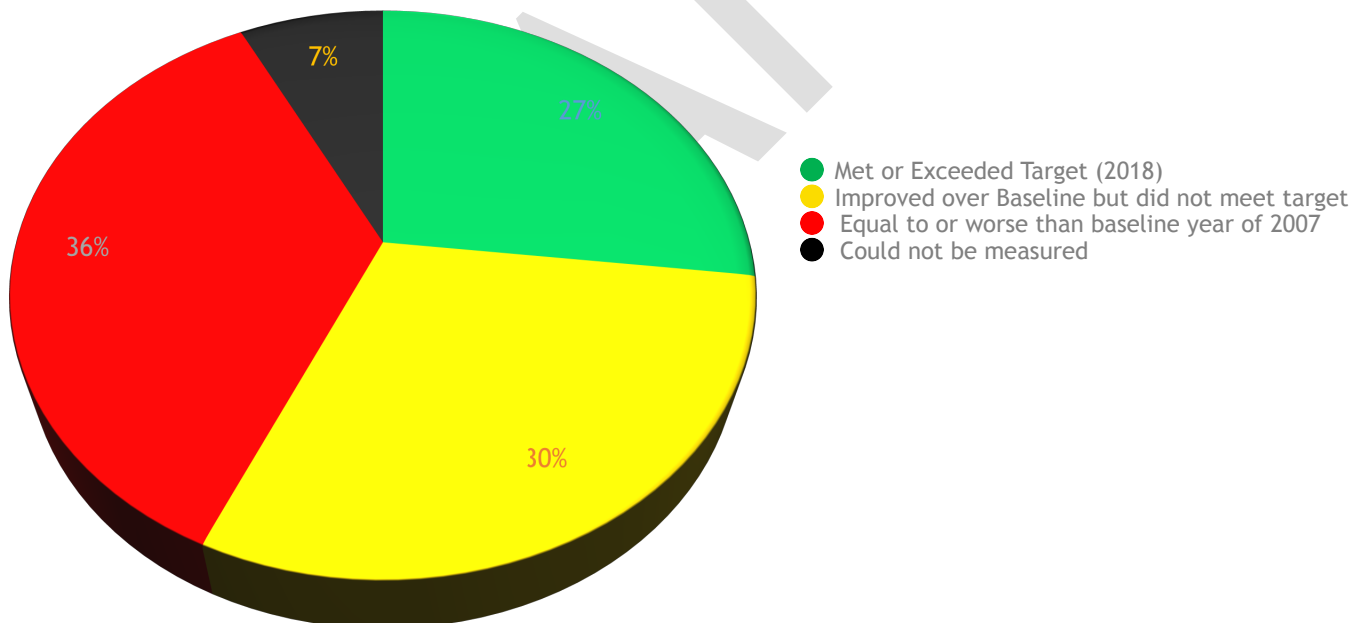
The overall progress of implementation of Vision 2030 Jamaica - National Development Plan under successive MTFs (2009-2012, 2012-2015 and 2015-2018) has been mixed. A summary of the progress made under the framework of national outcome indicators and targets for the Vision 2030 Jamaica - National Development Plan indicates that of a total of 67 indicators, 56.8 per cent have shown improvement over the baseline year 2007 based on results to 2017/18, while 35.8 per cent showed no improvement or worsened relative to the baseline year of 2007.

This can be further broken down as follows:

- 26.9 per cent of the Vision 2030 Jamaica targets were met or exceeded in 2017/18 compared with 25.4 per cent for the 2016/17 period
- 29.9 per cent of the indicators showed some improvement over the baseline year 2007 compared with 38.8 per cent for the 2016/17 period

- 35.8 per cent of the indicators showed no improvement or worsened compared to 31.3 per cent for the 2016/17 period
- 7.5 per cent of the indicators could not be compared in this way due to lack of agreed targets for the relevant period
 - Per cent staff/population ratio (physicians, nurses and mid-wives) per 1000 population
 - Poverty in rural areas
 - Percentage change in export earnings from the bauxite industry
 - Percentage of Renewables in Energy Mix
 - National Poverty Rate (prevalence)

Jamaica's Development Results 2009/10 - December 2018

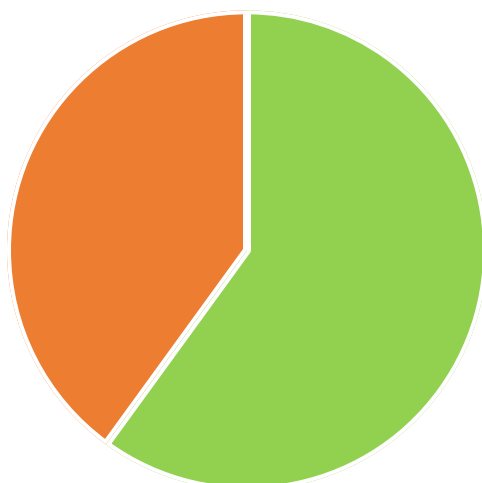


Analysis of Indicators Improving over the Baseline but not Meeting Target

At the end of the FY2017/18 period, approximately 31 per cent of the indicators showed some improvement towards meeting the targets. This compares with 39 per cent at the end of FY 2016/17. A further disaggregation of the data shows that:

- 60 per cent improved over the baseline and are moving in the direction of the target. This compares with 58 per cent for the 2016/17 period. Some of these indicators include:
 - Percentage of the labour force certified
 - Voice and accountability index
 - Nominal GDP per capita
 - Fiscal balance as a percentage of GDP (Fiscal Year)
 - Grade 4 literacy rates - both sexes
- 40 per cent improved over the baseline but are not moving towards meeting target. This compares with 42 per cent for the 2016/17 period. Some of these indicators include:
 - Energy intensity index
 - Housing quality index
 - Agriculture production index
 - Rule of law index
 - Resident patent filing

Breakdown of Indicators Showing Improvement Over Baseline 2007 but Not Achieving Target (Indicators in Yellow)



- Improved over Baseline-moving in direction of target
- Improved over Baseline-not moving in direction of target

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

At the end of the FY2017/18 period, 35.8 per cent of the 67 indicators showed no improvement or worsened relative to the baseline year of 2007. This compares with 31 per cent at the end of FY2016/17, reflecting an increase of 4.8 per cent. Though the increase represents development losses in the overall progress of implementation, the changes that occurred resulted from the net effect of development losses and gains in various areas across the 4 goals and 15 national outcomes. Hence, it is important to examine these changes to determine if the country is realizing the intended results (sustainable development gains) or experiencing development losses. This is particularly important if the country is losing development gains which it is striving to lock in.

An examination of these changes showed that:

- With regard to health, *Maternal mortality* and the *Unconditional probability of dying between ages of 30 and 70 from cardiovascular diseases, cancer, diabetes or chronic respiratory diseases* have worsened relative to the baseline
- In the area of *Education and Training*, attendance rates at the early childhood, primary and secondary levels declined below the baseline year of 2007. It is important to note that for 2012 all targets for attendance rates were met.
- The national poverty rate continues to be at undesired levels as it remains consistently worse than the baseline (2007) over the period 2008 - 2015. The percentage of PATH beneficiaries in consumption quintiles 1 and 2, is also worse than the baseline.
- Of particular concern is safety and security as category 1 crimes/100,000 population, murder rate/100,000 population and recidivism have all worsened relative to the baseline
- Five (5) consecutive years of growth has been recorded for the Jamaican economy (2013 - 2017). However, the performances for each year remained below the baseline.
- The unemployment rate remained worse than the baseline despite four consecutive years of improvement.
- Jamaica's position on the ease of doing business rank remained worse than the baseline.
- The respective indicators for manufacture; construction; recreational, cultural and sporting activities; financing and insurance real estate and business service industries all show performances worse than the baseline year. These indicators are: *Percentage change in export earnings from manufacturers, Percentage change in labour productivity of Construction and Installation sector, Growth Rate of Recreational, Cultural and Sporting Activities, Growth Rate of Services (Financing and Insurance and Real Estate and Business Services)*.
- The proportion of households with access to secure tenure and poverty in rural areas have remained below the baseline for the duration of the implementation period of MTF 2015 - 2018.
- With regard to the environment, Jamaica's score on the environmental performance index fell from a high of 77.02 for 2016 to 58.58 for 2018.

Analysis of Indicators Meeting or Exceeding Targets

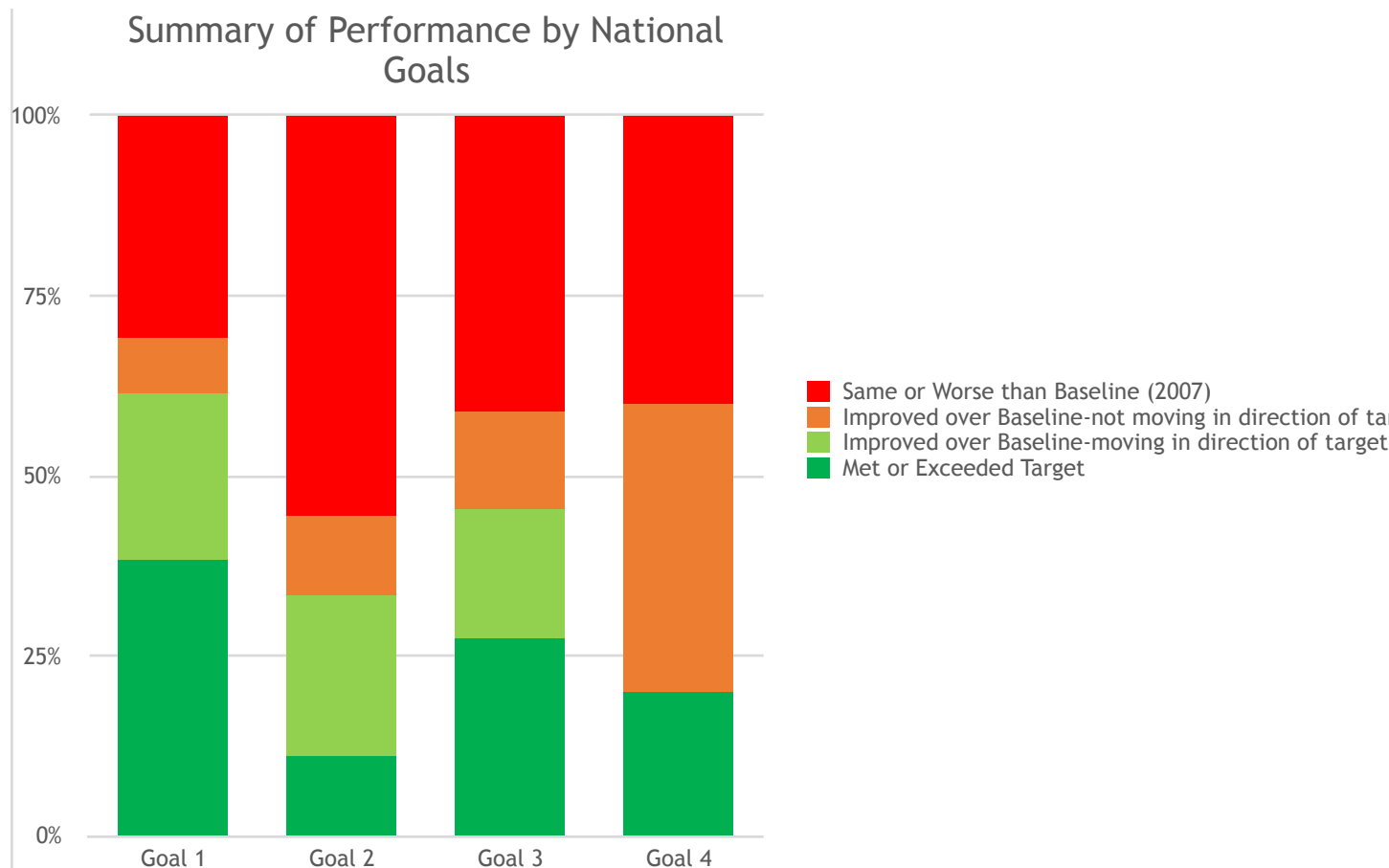
An examination of the indicators which met or exceeded the Vision 2030 targets revealed the following:

- Of the 26.9 per cent of the indicators which met or exceeded the Vision 2030 Jamaica targets, the majority, relate to the social and economic areas. Regarding the social area, some of the targets which were achieved include life expectancy, adult literacy (male), grade 4 literacy (male and female) and population growth rate.

- Notably, with respect to governance, the target for government effectiveness was achieved.
- In the economic area, targets for annual inflation were exceeded, representing subdued inflationary impulses over the 2015-2018 period. Regarding economic infrastructure, the 2018 target for the infrastructure index, was exceeded. Notably, all the indicators tracking progress of the tourism sector exceeded their respective targets. These are:
 - Percentage change in foreign exchange earnings from tourism
 - per cent change in visitor arrivals (stopover)
 - per cent change in visitor arrivals (cruise)
 - per cent change in the number of persons employed in the accommodations sector
- With regard to the environment, one (1) indicator, Hazard Damage as a per cent of GDP met the 2018 target.

Summary of Performance by the National Goals

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







The chart shows the following:

- The largest development gains were under Goal 1: “Jamaicans are Empowered to Achieve their Fullest Potential”, followed by Goal 3: “Jamaica’s Economy is Prosperous”
- Whilst there are many development gains under Goal 1 such as life expectancy, child mortality rate, grade 4 literacy rates, grade 4 numeracy rates, per cent of labour force (14 to 65) that is certified, secondary level enrolment rates among others, there is need to be mindful of the high levels of poverty, including rural poverty, as well as the effects of non-communicable diseases (e.g. diseases of the circulatory system, cancer, respiratory among others).
- In the area of education, the indicators used to track and monitor attendance rate at the early childhood, primary and secondary levels show declining trends. In fact, attendance rates at all levels have fallen below the baseline year of 2007
- The area of greatest concern for the country is Goal 2 “The Jamaican Society is Secure, Cohesive and Just”. All indicators tracking progress in the area of safety and security showed performances which were worse than the baseline year of 2007. These include category 1 crimes/100,000 population, murder rate /100,000 population and recidivism.

- With respect to effective governance, which also captures justice related results, majority of the indicators have shown improvements over the baseline year of 2007 based on data up to 2017. The outturn for the government effectiveness index exceeded the target for 2018 while the indicators voice and accountability index, control of corruption index and rule of law index all showed improvements over the baseline year of 2007 but did not achieve the 2015 nor 2018 targets. The case clearance rate and the regulatory quality index both showed worse performances relative to the baseline year.
- Under Goal 3 “Jamaica’s Economy is Prosperous”, the greatest gains were realized in the macroeconomy and the tourism industry.
- With respect to the macroeconomy, the target for annual inflation rate was met while debt to GDP ratio (fiscal year), fiscal balance as a percentage of GDP (fiscal year), and nominal GDP per capita are moving towards meeting their respective targets. Moreover, all targets for the tourism sector have been met for 2018.
- There are also development gains in the build out of strong economic infrastructure as the target for the infrastructure index was achieved.
- Under Goal 4, Jamaica has a healthy natural environment, Jamaica continued to perform better than the baseline year of 2007 with respect to the housing quality index and the proportion of households with access to secure tenure based on data up to 2015, the latest available. However, the 2015 targets for both indicators were not achieved. Rural poverty, which is also used an indicator for rural and urban development, remains a concern for the country. With respect to environmental performance, there were some development losses in this area for the country evidenced by a fall in the country’s 2018 score on the environmental performance index. This outturn is below the baseline performance of 2007 and requires urgent attention.

Summary of Indicators by performance against Targets and Baseline

Traffic Signal	No. of Indicators	%	Examples of Selected Indicators
<p>Green</p> 	18	26.9%	<p>Goal 1: Life expectancy at birth, Population growth rate, Grade 4 literacy rates (male), Grade 4 literacy rates (female)</p> <p>Goal 2: Government Effectiveness Index</p> <p>Goal 3: Annual inflation rate, Infrastructure Index, Percentage change in foreign exchange earnings from tourism,</p> <p>Goal 4: Hazard damage as a percentage of GDP</p>
<p>Yellow</p> 	21	29.9%	<p>Goal 1: Human Development Index, Adolescent (10-19 y.o.) Fertility Rate, Percentage of labour force that is certified, Grade 4 Numeracy Rates-both sexes</p> <p>Goal 2: Control of Corruption Index, Rule of Law Index, Voice and Accountability Index</p> <p>Goal 3: Fiscal balance as a percentage of GDP (Fiscal Year), Nominal GDP per capita, Energy intensity index, Resident patent filing, Agriculture production index,</p> <p>Goal 4: Number of parishes with Sustainable Development Plans not older than 5 years, Housing quality index</p>
<p>Red</p> 	24	35.8%	<p>Goal 1: Maternal Mortality Ratio, Percentage of PATH beneficiaries in consumption quintiles 1 and 2, Use of Cultural Resources Index</p> <p>Goal 2: Regulatory Quality Index, Case Clearance Rate</p> <p>Goal 3: Real GDP annual growth rate (base 2007), Ease of Doing Business Ranking, Unemployment rate, # of scientific publications, Growth rate of services (Financing and Insurance and Real Estate and Business Services), Percentage change in export earnings of Manufactures (value not volume) (rolling 3-year average), Travel and Tourism Competitiveness Index</p> <p>Goal 4: Proportion of households with access to secure tenure, and Environmental Performance Index</p>
<p>Grey</p> 	5	7.5%	<p>Goal 1: Child (<5 yrs.) mortality ratio, % staff/population ratio (physicians, nurses and mid-wives) per 1000 population</p>
TOTAL	67	100%	

Traffic Signals (based on results up to and including December 2018):

Green - Met or exceeded target (2018)



Yellow - Improved over baseline year of 2007 but did not meet target (2018)

Red - Equal to or worse than baseline year of 2007

Grey - Not applicable

Note: Measurement is against 2015 target for indicators with 2013, 2014, 2015 and 2016 data, and against 2018 target for indicators with 2017 and 2018 target

Summary: Indicators showing improvement over baseline but not achieving target

Traffic Signal	No. of Indicators	%	Examples of Selected Indicators
Lime Green 	12	60%	Goal 1: Adult Literacy Rate (15 and over) - Female, Grade 4 literacy rates - Both sexes (1), Grade 4 Numeracy Rates, % of labour Force (14 to 65) that is certified - Both sexes, Goal 2: Voice and Accountability Index, Rule of Law Index Goal 3: Nominal GDP per capita, Fiscal balance as a percentage of GDP Goal 4: - No indicators in lime green
Orange 	8	40%	Goal 1: % of students sitting CSEC exams passing 5 or more subjects including English Language and/or Maths Goal 2: Control of Corruption Index Goal 3: Energy Intensity Index, (Fiscal Year), Agriculture Production Index, Resident Patent Filing Goal 4: Housing Quality Index, Number of parishes with sustainable development plans not older than 5 years
TOTAL	20	100%	

Traffic Signals (based on results up to December 2018):

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

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