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FOREWORD

The successful conclusion of an agreement to establish a four-year arrangement under the Extended Fund Facility (EFF) with the International Monetary Fund (IMF) took place on May 1, 2013 and provided Jamaica with access to Special Drawing Rights (SDR) of 615.38 million (approximately US$932.0 million) in funds over the four-year period, 2013/14 – 2016/17. The EFF also triggered resumption of budget support and loans from other International Development Partners. Economic reviews for the April–June and July–September quarters were successfully completed during the year, and the country is on target to satisfy all the targets for the remaining two quarters of FY 2013/14. There was a return to growth in the economy in the September and December quarters, and it is projected that there will be continued and more robust growth for the remainder of the fiscal year. On April 1, 2013, a Growth Secretariat was established at the PIOJ to spearhead the execution of strategies aimed at improving the rate of growth of real Gross Domestic Product of the Jamaican economy over the medium-term.

Work continued on the country's long-term Economic Reform Programme (ERP), as the Government of Jamaica implemented policies and programmes to spur economic growth through: enhancing market competitiveness; achieving fiscal and debt sustainability through fiscal consolidation; and attaining current account sustainability. Development and implementation of the ERP is pivotal to the government's four-year EFF arrangement negotiated with the IMF. The programme recorded some success in 2013 despite the difficult economic environment. There was a single digit inflation out-turn; and all quantitative targets were met under the EFF.

In an effort to ensure that the vulnerable in the society are protected, the country's first comprehensive social protection strategy was developed. The Strategy seeks to define the goals and objectives of an effective social protection system, and to propose a structured approach to interventions across the gamut of social welfare, social security and labour market initiatives. The Social Protection Strategy will guide the actions of government and NGO's in achieving the goal of effective social protection. In addition, the government established a focal point for the coordination of poverty reduction efforts at the PIOJ, with the immediate objective being to frame a revised Policy and Programme to reflect priority issues. The Community Renewal Programme Secretariat, which is housed at the PIOJ, commenced capacity building activities in 17 of the most volatile communities in Downtown Kingston. Phase 1 intervention included the Majesty Gardens Renewal Project and the Seaview Gardens Training Institute Project, the latter aimed at preparing Jamaicans for employment under the Logistics Hub initiative.

The PIOJ is the National Secretariat for V*ision 2030 Jamaica – National Development Plan*, the country's first long-term strategic plan. Two stellar achievements in 2013 were the completion and approval by Cabinet of the new Medium Term Socio-economic Framework which covers the period 2012–2015 and the development of the Vision 2030 Jamaica e-Dashboard of Indicators, which monitors the progress of implementation of the Plan.

The year 2013 was undoubtedly a challenging one for the country as it sought to successfully complete the prior actions and meet all the quantitative targets and structural benchmarks under the four-year EFF. With the successful implementation of the GOJ's Economic Reform Programme, and assisted by increased external demand and favourable weather conditions, the economy grew by 0.2 per cent at the end of the calendar year as it moved along the path to recovery.

Colin Bullock
Director General
Planning Institute of Jamaica

ACKNOWLEDGEMENTS

The Planning Institute of Jamaica (PIOJ) presents yet another issue in the series of its annual flagship publication — the ***Economic and Social Survey Jamaica (ESSJ)*** 2013 — which continues to provide its readers with in-depth analysis of Jamaica's social and economic performance on an annual basis. The Institute wishes to record its appreciation to the various individuals and organizations who supplied needed information or contributed otherwise to the preparation and production of this document.

Regrettably, it is not possible to mention all organizations who assisted. However, special mention must be made of the Bank of Jamaica; the Statistical Institute of Jamaica (STATIN); the Ministry of Finance and Planning; and all other Ministries, statutory organizations, departments and agencies, as well as private firms, who allowed us access to their data bases and provided valuable oversight for specific chapters in the document. Thanks also to those individuals and agencies who supplied us with photographs and permission to reproduce them.

Finally, the Institute takes this opportunity to congratulate its own staff, many of whom had the arduous task of writing more than one chapter, and still found the time to offer constructive criticism to their colleagues. Additionally, it would be remiss of us not to thank the Jamaica Printing Services Limited whose staff worked tirelessly to produce the document in time for the annual budget debate.

SELECTED INDICATORS
2010–2013

	Unit	2010	2011	2012	2013
GDP at Current Market Prices	$b	1 153.7[r]	1 239.8[r]	1 313.1[r]	1 420.5[p]
GDP in Basic Value at Current Prices	$b	991	1 067.0[r]	1 123.3[r]	1 203.1[p]
GDP in Basic Value at Constant (2007) Prices	$b	724.4[r]	734.5[r]	731.0[r]	732.4[p]
Growth in GDP in Basic Value at Constant (2007) Prices	%	-1.4[r]	1.4[r]	-0.5[r]	0.2[p]
Goods Production as % of Total Real GDP	%	24.0	24.9	24.5[r]	24.6[p]
Agriculture "	%	6.6[r]	6.6	6.8	6.7[p]
Mining & Quarrying "	%	2.1	2.4	2.2	2.3[p]
Manufacture "	%	8.5	8.6	8.5[r]	8.4[p]
Construction "	%	7.4	7.3	7.0[r]	7.1[p]
Services "	%	80.4[r]	79.3	79.5	79.4
Basic Services "	%	14.6[r]	14.3	14.2	14.2
Electricity & Water "	%	3.3	3.3	3.2[r]	3.2
Transport, Storage & Communication "	%	11.3	11.0	11.0[r]	11.0
Total Other Services "	%	65.8[r]	65.0[r]	65.3	65.3
Financial Intermediation Services Indirectly Measured	%	4.4	4.2	4.1	4.0
Exports as % GDP (current)	%	10.1	11.0	11.7[r]	11.1
Imports "	%	40.3	43.8[r]	42.9[r]	44.1
GDP per capita					
Current	$'000	428.0	467.4	484.3[r]	522.6
Constant	$'000	268.3	270.3	269.6[r]	269.5
Consumer Price Index (CPI)(end Dec.)		168.1	178.2	192.5	210.7
Inflation : Dec./Dec.	%	11.7	6.0	8.0	9.5
: Annual Avg		12.6	7.5	6.9	9.4
Implicit GDP Deflator, 2007 = 1.00 [a]		1.4	1.5	1.5	1.6
Changes in Implicit Deflator	%	8.2[r]	6.2[r]	5.8[r]	6.9
Avg. Wtd. Comm. Bank Loan Rate	%	20.40	18.03	18.44	17.49
Avg. Wtd. Comm. Bank Deposit Rate	%	2.95	2.44	2.10	2.04
Ja. Stock Exchange Index (end Dec.)	Points	85 220.8	95 297.2	92 101.2	80 633.5
Stock Market Capitalisation	$b	564.7	619.4	590.6	492.2
M1	$b	112.2	120.6	133.3	148.7
% Change	%	4.1	7.4	10.5	11.6
M2	$b	337.7	351.4	374.5	416.0
% Change	%	1.7	4.1	6.6	11.1
Total Revenue [b]	$b	314.6	322.5	344.7[r]	336.4
Recurrent Revenue	$b	310.9	311.9	339.7[r]	326.5
Total Expenditure	$b	388.8	403.2	399.3[r]	361
Recurrent Expenditure	$b	333.2	350.0	361.5[r]	342.4
Capital Expenditure	$b	55.6	53.2	37.8[r]	31.1
Debt Servicing	$b	230.5	249.1	208.3	225.2
Surplus/Deficit	$b	-74.2	-80.7	-54.6[r]	-24.6
Total Revenue as a % of GDP	%	26.4	25.5	26.3	n/a
Recurrent Revenue "	%	26.1	24.7	25.9	n/a
Recurrent Expenditure "	%	27.9	27.7	27.5	n/a
Total Expenditure (excluding Amortisation) "	%	32.6	31.9	30.4	n/a
Surplus/Deficit "	%	-6.2	-6.4	-4.2	n/a
Debt Servicing "	%	19.3	19.7	15.9	n/a
EXTERNAL TRADE					
Total Imports (c.i.f.)	US$ m	5 326.4	6 439.4	6 331.1[r]	6 218.6
Annual Growth In Total Imports	%	5.2	24.2	-1.7	-1.8
Consumer Goods (excl. Motor Cars)	US$ m	1 702.0	1 682.6	1 615.1[r]	1 590.9
Raw Material/Intermediate Goods	US$ m	3 088.6	4 118.3	4 000.8[r]	3 909.6
Capital goods (excl. Motor Cars)	US$ m	429.2	494.3	494.2[r]	507.4
'Passenger Motor Cars	US$ m	106.6	144.1	221.0[r]	210.7

	Unit	2010	2011	2012	2013
Total Exports (f.o.b.)	US$ m	1 335.7	1 622.4	1728.4[r]	1559.9
Annual Growth In Total Exports	%	1.2	21.6	5.4	-9.7
Traditional Exports	US$ m	654.3	860.5	814.0[r]	779.5
Bauxite	US$ m	128.7	141.9	130.1	128.0
Alumina	US$ m	402.8	580.7	508.3	523.7
Sugar	US$ m	44.2	62.2	94.1	53.2
Banana	US$ m	0.001	0.063	0.1	0.1
Non-Traditional Exports	US$ m	599.1	674.7	846.7[r]	699.5
Wearing Apparel	US$ m	1.6	1.5	1.4	1.4
Trade Balance	US$ m	-3 990.7	-4 817.0	-4 602.7[r]	-4 658.7
BALANCE OF PAYMENTS					
Current Account Balance	US$ m	-934.0	-2 116.5	-1 729.0	n/a
Goods Balance	US$ m	-3 259.0	-4 257.6	-4 158.0	n/a
Total Imports	US$ m	4 627.4	5 922.4	5 904.7	n/a
Total Exports	US$ m	1 368.0	1 664.8	1 746.7	n/a
Services (Net)	US$ m	810.0	669.8	588.5	n/a
Balance on Goods and Services	US$ m	-2 449.0	-3 587.8	-3 569.5	n/a
Income (Net)	US$ m	-494.6	-518.4	-207.3	n/a
Current Transfers (Net)	US$ m	2 010.0	1 989.8	2 047.9	n/a
Capital & Financial Account Balance	US$ m	934.0	2 116.5	-944.9	n/a
Reserves (Minus=Increase)	US$ m	-442.0	205.2	-840.2	n/a
Private Remittance Inflows	US$ m	1 906.2	2 018.4	2 042.5[r]	2 065.0
Net International Reserves	US$ m	2 171.41	1 967.01	1 125.58	1 047.83
Net Foreign Assets	$b	239.8	229.2	192.2	194.5
Nominal Exchange Rate ($ per US$1.00) Average Annual	$	87.38	86.08	88.99	100.77
Total Visitor Arrivals	Million	2.8	3.1	3.3	3.3
Stopover	Million	1.9	2.0	2.0	2
Cruise Passengers	Million	0.9	1.1	1.3	1.3
Occupancy Rates	%	60.5	60.5	62.3	n/a
Foreign Exchange Earnings	US$Million	2 001.2	2 008.4	2 069.6r	2 077.1
Energy					
Petroleum Imports [c]	mb	18.6	19.5	18.7[r]	19.7
Electricity Generated	GWh	4 137.4	4 137.0	4 136.0	4 146.0
Population	'000 persons	2 695.5	2 704.1[r]	2 711.5	2 718.0
Growth Rate	%	0.3[r]	0.3	0.3	0.2
Crude Birth Rate	per 1000 pop.	15.1[r]	14.7[r]	14.8[r]	13.5
Crude Death Rate	per 1000 pop.	8.0[r]	6.3[r]	6.3[r]	5.7
Natural Increase	%	7.1[r]	8.4[r]	8.5[r]	7.8
Total Fertility Rate	%	2.4	2.4	2.4	2.4
Net External Movement	'000 persons	-9.7[r]	-14.5[r]	-15.0	-14.7
Labour Force	'000	1 249.7	1 251.3	1 281.9[r]	1 308.7
Male	'000	685.8	685.3	702.9[r]	713.5
Female	'000	563.9	566	578.9[r]	595.1
Labour Force Participation Rate	%	62.4	62.3	61.9[r]	63.0
Male	%	70.4	70.2	69.0[r]	70.0
Female	%	54.8	54.9	55.0[r]	56.3
Total Employment	'000	1 094.9	1 093.0	1 103.4[r]	1 109.1
Male	'000	622.6	621.6	629.1[r]	633.4
Female	'000	472.3	471.4	474.2[r]	475.6
Total Unemployment Rate	%	12.4	12.6	13.9[r]	15.2
Male	%	9.2	9.3	11.0[r]	11.0
Female	%	16.2	16.7	18.0[r]	20.0
Average Weekly Earnings of All Employees (1990 $) [d]	$	15 823	17 532	18 113	20 398
Education					
Enrolment in :	('000)				
Primary Institutions	"	294.7	289.6	283.6	269.5
Secondary Institutions	"	265.1	260.4	251.7	239.9
Tertiary Institutions	'	32.8	27.5	35.4	34.4
University	"	36.2	41.5	39.2	40.1

	Unit	2010	2011	2012	2013
Literacy Rate[e]	%	91.7	91.7	91.7	91.7
Training					
Total output of Technical, Managerial & Related Manpower	('000)	13.2	15	15.5	15.1
Total output of Skilled and Semi-skilled Manpower	"	48.1	48.6	50.3	65.6
Health					
Infant Mortality Rate	per '000 live births	16.7	16.7	16.7	16.7
Percentage Beds Occupancy	%	61	61.9	67.8[r]	72.8
Immunization (National Average):	%				
- DPT, OPV, BCG (0–11 months)	%	100.5[r]	93.9	89.7[r]	90.6
- MMR (12–23 months)	%	95.0[r]	86.5[r]	80.0[r]	94.0[r]
Access to Safe Water	%	77.4	n/a	n/a	n/a
Sanitary Facility	%	99.5	n/a	n/a	n/a
Life Expectancy (at birth)	yrs	72.7	72.7	72.7	73.1
Maternal Mortality	per 100 000	94.8	94.4	94.4	94.4
National Security					
Overall Crime Rate	per 100 000	n/a	n/a	n/a	n/a
Major Crime Rate	"	409	403	396[r]	351
Murder Rate	"	53	42	40	44
Environmental					
Rate of deforestation (%)	%	0.1	0.1	0.1	0.1
Energy Consumption per capita	(BOE)	7.5	7.7	7.3	7.3
Alternative Energy ('000)	(BOE)	948	1 057	444	556
Per capita domestic water consumption	Megalitres	0.036	0.038	0.035	0.034
Annual Rainfall (mm)	mm	2 272	1 747	1 567	1 470
Avg. Annual Temperature	Celsius	27.9	27.9	28.0	28.2
Population ('000)		2 695.5	2 704.1	2 711.5	2 718.0
% population in urban areas		52.0	52.0	54.0	54
Per Capita Waste generation (kg/day)		0.86	0.70	n/a	0.74
Science, Technology & Innovation					
Fixed line penetration (%)		10.5	10.1	9.34[r]	9.14
Mobile Penetration (%)		117.6	112.1	100.1[r]	103.1
Broadband Penetration (%)		4.2	4.3	4.4	4.9
EIU Digital economy ranking		44 of 70	n/a	n/a	n/a
Resident patent filings		13	20	25	22

Notes :

a -The Implicit Deflator, an index of average prices, is calculated as the ratio of GDP at current prices to GDP at contant prices.

b - Revenue and Expenditure Figures are for the fiscal years 2007/08 – 2012/13 however the data for FY2013/14 is for the period April 2013 to February 2014

c - Excluding marketing companies

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

e - Figure for Literacy is based on the Literacy Module of the Jamaica Survey of Living Conditions

Mobile figure for 2013 is at June

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.

mb - million barrels

p - provisional

n/a - not available

r - revised

BOE - Barrel of Oil Equivalent

OVERVIEW 2013

INTRODUCTION

During 2013, Jamaica made significant strides in laying the foundations for achieving the goals of *Vision 2030 Jamaica – National Development Plan.* Developments during the year were highlighted by the challenges encountered in re-establishing formal borrowing arrangements with the International Monetary Fund (IMF) and satisfying the conditions necessary for the successful completion of the quarterly reviews. On May 1, 2013 the Government of Jamaica entered into a formal arrangement with the IMF, with the approval of a four-year agreement under the Extended Fund Facility. This loan agreement was valued at special drawing rights (SDR) 615.38 million or (US$932.0 million) and was contingent on the implementation of four prior actions focused on fiscal adjustment and public debt management. The prior actions involved:

— entering into a three-year wage restraint agreement with the Trade Unions representing at least 70.0 per cent of public sector workers

— implementing a National Debt Exchange (NDX) programme which involved the exchange of existing domestic bonds with new bonds of lower coupon rates and longer maturity periods

— the suspension in the granting of discretionary waivers and placing a cap on total waivers granted until the new Omnibus Incentive Regime is established

— the implementation of the Public Debt law geared at strengthening the debt management process.

Jamaica met all the prior actions and successfully completed the two quarterly reviews by the IMF, for April–June and July–September, which were conducted during the calendar year. The agreement also facilitated the resumption of grant funding and borrowing arrangements with the International Developments Partners.

Key achievements during the year included:

— The implementation of key reforms to the business environment and fiscal consolidation. This involved the passing of the omnibus legislation governing the granting of incentives; probate reform to facilitate the smooth transfer of land; the Insolvency Act to remove the punitive charges associated with declaring bankruptcy; the 'Business Superform' to expedite the process of business registration; and several initiatives to facilitate increased access to credit, especially for small businesses.

— Continued implementation and facilitation of several strategic projects to support medium-term economic growth, including:

  – four additional Agro Parks

  – hotel construction projects

  – intensified efforts to facilitate the investments in energy solutions and the logistics hub.

For 2013, Real Gross Domestic Product (GDP) grew by 0.2 per cent relative to 2012. This performance reflected increases of 0.4 per cent and 0.1 per cent in the Goods Producing and Services Industries. Within the Goods Producing Industry, increases were recorded by the Mining & Quarrying and the Construction industries. The performance of the Services Industry was driven by growth recorded for Hotels & Restaurants and Finance & Insurance Services. The Jamaican economy operated within a context of an expanding but still vulnerable global economy. Despite these conditions, the overall increase in global output and trade translated into increased demand for some exports of Jamaican goods and services. There was improved international price competitiveness for Jamaican exports during 2013, as the exchange rate recoded a real depreciation of 4.4 per cent relative to the US dollar. The rate of inflation for 2013 was 9.5 per cent, which was 1.5 percentage points higher than the rate recorded for 2012.

This year represented the fifth of the 21-year implementation period for *Vision 2030 Jamaica – National Development Plan.* The main area of focus was on building the long-term sustainable framework for the implementation, monitoring, evaluation and communication of the Plan. Some of the main achievements during the year include:

— alignment of key national policies and strategies with *Vision 2030 Jamaica*, including the National Sport Policy, International Migration and Development Policy, National Food and Nutrition Security Policy and the Draft Diaspora and Development Policy

— continued progress on the alignment of the corporate and operational plans of Ministries, Departments and Agencies with *Vision 2030 Jamaica* and establishment of the monitoring and evaluation system for the Plan

— completion and approval of the new *Medium Term Socio-Economic Policy Framework (MTF)* for FY2012/2013–FY2014/2015. It provides the strategic framework of development priorities at the national and sectoral levels for the implementation of *Vision 2030 Jamaica* over the three year-period.

There was a 250.2 per cent increase in new ***Official Development Assistance*** (ODA) compared with 2012. New and ongoing ODA[1] supported the goals and objectives outlined in the Medium Term Socio-Economic Policy Framework 2012-2015, as well as Government's reform agenda. New resources through loans, grants and technical assistance were primarily directed to the key areas of: road infrastructure, policy and institutional reform, as well as improved fiscal and public sector management, including public financial management.

Sustainable Development activities undertaken were primarily focused on increasing the resilience of the natural environment, climate change adaptation, institutional capacity building, development planning, and geospatial data management.

Science, Technology and Innovation initiatives continued to support the country's drive to create more competitive business structures, in keeping with *Vision 2030*. These initiatives included the adoption of product and service standards and the accreditation of conformity assessment bodies to key ISO standards.

The Jamaican ***population*** at the end of 2013 was estimated at 2 718 000, with a growth rate of 0.2 per cent. Among the three fundamental processes influencing population age and structure (births, death and migration) migration continues to play an integral role in impacting population growth.

The **labour market** continued to be shaped by developments in the economy and population demographics in 2013. The average employment level grew by 0.5 per cent in 2013 relative to 2012, partly in response to the recovery of the economy; however, the unemployment rate rose by 1.3 percentage points to 15.2 per cent as there was an increase in the labour force. The **labour force** grew by 2.1 per cent to 1 308 650, of which males accounted for 54.5 per cent. The increase in the labour force reflected an increased working age population and an increase in the labour force participation rate.

The ***Education and Training*** agenda continued to be guided by the goals of *Vision 2030 Jamaica*. The priorities during the year included Early Childhood Development, Special Education, Media and ICT in Education, Teacher Quality, Tertiary Education and the Infusion of Technical Vocational Education and Training in the school system. Other areas of focus included the elimination of the shift system, the introduction of a High School Diploma Equivalency Programme for adult learners, and the strategic alignment of Science, Technology, Engineering and Mathematics in schools using age-appropriate methodologies.

The national priorities in the area of ***Health*** included: improving maternal and child health; prevention and control of non-communicable diseases; renewed primary health care; strengthening of the national health information system; and improving the estimate of accounting for the effective efficient delivery of health care.

The ***Social Development*** initiatives continued to focus on the vulnerable population groups. Emphasis was placed on the implementation of the National Policy for Gender Equality and the mainstreaming of gender throughout the public sector. A comprehensive Social Protection Strategy was drafted to provide a conceptual framework and structure for a strengthened social protection system.

Development in the area ***National Security,*** resulted in a decline in the incidence of crime and violence despite an increase in the number of reported murders. The Jamaica Constabulary Force (JCF) maintained its focus on managing crime and violence through a number of initiatives, including the implementation of a Violence Reprisal Risk Ranking system.

VISION 2030 JAMAICA – NATIONAL DEVELOPMENT PLAN

During 2013, the implementation of the country's first long-term strategic plan, *Vision 2030 Jamaica – National Development Plan and the Medium Term Socio-Economic Policy Framework (MTF) 2009–2012* continued. *Vision 2030 Jamaica* provides a comprehensive planning framework in which the economic, social, environmental and governance aspects of national development are integrated. The Plan is expected to put Jamaica in a position to achieve developed country status by 2030 and is based on the vision: *"Jamaica, the place of choice to live, work, raise families and do business"*. During 2013, the fifth year of the 21-year implementation period for *Vision 2030 Jamaica*, focus was placed on building the long-term sustainable framework for the implementation, monitoring, evaluation and communication of the Plan.

Over the period, several results were achieved including the institutionalization of *Vision 2030 Jamaica* in Ministries, Departments and Agencies (MDAs) through the infusion of national and sectoral strategies into the corporate and operational plans of MDAs, and alignment to the National Budget. The process of mainstreaming the Plan within PIOJ involved its integration into the corporate planning, policy development, and communications functions of the Institute. As the ***National Secretariat*** for *Vision 2030 Jamaica*, the PIOJ continued to carry out meetings with MDAs to facilitate alignment of key national policies and strategies with *Vision 2030 Jamaica*, including the new National Sport Policy, National Policy and Plan of Action on International Migration and Development, National Food and Nutrition Security Policy and the Draft Diaspora and Development Policy.

In addition, the PIOJ continued to work closely with the Cabinet Office to complete the alignment of the new Strategic Business Plan templates by MDAs in FY 2013/2014 with the goals and outcomes of *Vision 2030 Jamaica* and the MTF 2012-2015. This included the explicit alignment of the three (3) year plans and budgets of all ministries under the phased establishment of the Performance Monitoring and Evaluation System (PMES) in the public sector. The PIOJ also participated in the development of the draft templates for the proposed Whole-of-Government Business Plan and Progress Reports being undertaken by the Cabinet Office, in alignment with *Vision 2030 Jamaica* and the MTF 2012-2015. In June 2013, the PIOJ in collaboration with the Cabinet Office hosted a workshop on Results-Based Management (RBM) at MIND.

1 ODA is concessionary loans, grants and technical assistance to developing countries for the promotion of their economic development and welfare as its main objective.

The PIOJ also ensured the alignment of the Growth-Inducement Strategy (GIS), which was developed as a key initiative under *Vision 2030 Jamaica*, with the Medium Term Economic Programme FY2013/14 – FY2015/16 of the Government, and with the Extended Fund Facility Arrangement with the International Monetary Fund (IMF). Presentations on the Growth Agenda were made to key ministries, including the Ministry of Finance and Planning, and to the Economic Development Committee of Cabinet, the Permanent Secretaries' Board and the Cabinet Office Corporate Planners and Policy Analysts Network. The PIOJ also served as the National Focal Point for the Caribbean Growth Forum (CGF) project, including staging of the launch of the CGF Jamaica Chapter at the CGF Workshop on May 2, 2013; and participation in the CGF Regional Workshop in The Bahamas, from June 23 to 25, 2013.

A draft Three-Year Progress Report on *Vision 2030 Jamaica* for FY 2009/2010–FY 2011/2012 was completed for review by stakeholders. As an integral part of the PIOJ's Quarterly Press Briefings, four quarterly reports were presented on the National Dashboard of Indicators, which was introduced in 2010 to track progress towards achievement of the national goals of *Vision 2030 Jamaica*, using eight areas of measurement of national development and social well-being. The full framework of over 60 national indicators and targets used to track progress under *Vision 2030 Jamaica* was also updated on the JAMSTATS database, the comprehensive national database used to store the *Vision 2030 Jamaica* framework of indicators and targets. The *Vision 2030 Jamaica* National Secretariat in collaboration with the JAMSTATS Unit and UNICEF Jamaica, with technical consultancy services from the UN DevInfo Support Group, completed the development of an online interactive graphical dashboard that will facilitate monitoring of progress in implementing *Vision 2030 Jamaica*. The E-Dashboard was launched in 2013.

Seven Thematic Working Groups (TWGs) held meetings during the year, including Education and Training, National Security, Environment and Natural Resources Management, Hazard Risk Reduction and Adaptation to Climate Change, Population, Tourism, and Health. Preparations were made for the resumption of meetings for the TWGs for Strong Economic Infrastructure, Effective Social Protection, Energy and Minerals Development, and for a TWG for Justice to be formed from the previously combined National Security and Justice TWG. A highlight of the year was the launch of the Governance TWG in December 2013. Meetings were held with relevant ministries toward the establishment of the remaining seven TWGs, including the Ministry of Youth and Culture, Ministry of Industry, Investment and Commerce, Ministry of Agriculture and Fisheries, and the Ministry of Science, Technology, Energy and Mining.

The PIOJ, in its capacity as National Secretariat for *Vision 2030 Jamaica*, led the process of completion of the new *Medium Term Socio-Economic Policy Framework (MTF)* for FY2012/2013–FY2014/2015. The new *MTF 2012–2015* will provide the strategic framework of development priorities at the national and sectoral levels for the implementation of *Vision 2030 Jamaica* over the three-year period FY2012/2013 to FY2014/2015. The steps taken during the period for the completion of the new MTF 2012-2015 included:

— Preparation of Draft MTF 2012-2015 for circulation and review by stakeholders.

— A Consultative Review Workshop to obtain feedback from stakeholders held on the Draft MTF 2012-2015 in February 2013.

— Completion of Final MTF 2012-2015 incorporating feedback from stakeholders and submission to Cabinet in March 2013.

— Presentation on MTF 2012–2015 to Cabinet and approval of MTF 2012–2015 by Cabinet in April 2013.

A range of activities was undertaken during the period to support the communication programme for *Vision 2030 Jamaica*, including media publicity, preparation and distribution of promotional materials, participation in promotional events, and production and distribution of the quarterly e-newsletter. Communication interventions included the completion of the Audio Version of the Popular Version of the *Vision 2030 Jamaica - National Development Plan* and staging of the *Vision 2030 Jamaica* Essay Competition Awards Ceremony. Strategic partnerships were strengthened with key organizations to infuse *Vision 2030 Jamaica* into activities related to national development.

INTERNATIONAL ECONOMY

Global economic activity increased during 2013. This was evident in a 3.0 per cent growth in output as well as expansions in trade and foreign direct investment. Increased output was attributed to expansions in global industrial production, private consumption and investment, facilitated by accommodating monetary and fiscal policies. Emerging Market Economies grew by 4.7 per cent, pushed mainly by the Developing Asia, particularly China. Advanced Economies also grew (1.3 per cent), led by the performance of the United States of America.

The pace of global growth was, however, weaker than initially anticipated, given the realization of several downside risks. Among these were a slowing in the rate of growth of Emerging Market Economies and continued weak economic conditions in the Euro Area. Additionally, uncertainty regarding the fiscal and monetary policies of some Advanced Economies, stymied further improvement in global economic performance. These developments led the International Monetary Fund to revise downwards its projections for global growth in 2013.

Within the markets for commodities, both energy and non-energy prices declined. Energy prices were constrained by subdued demand conditions associated with concerns about weakened prospects of the global economy and anticipated monetary tightening measures. The decline in non-energy prices reflected mainly, the impact of improved supply prospects brought about by favourable weather conditions and adequate inventory levels.

The focus of the World Trade Organization's (WTO) multilateral trade negotiations during 2013 was on completing a trade agreement on a sub-set of issues within the Doha Development Round. At the 9th Ministerial Conference, WTO members adopted the Bali Package which involved a series of decisions aimed at improving trade facilitation through: streamlining trade; allowing Least

Developed Countries (LDCs) more options for food security; and increasing LDCs trade and development.

OFFICIAL DEVELOPMENT ASSISTANCE (ODA)

Agreements with International Development Partners (IDPs) totalling US$3.1 billion[2] ($312.4 billion)[3] for new and ongoing Official Development Assistance (ODA)[4] continued to support the goals and objectives outlined in the Medium Term Socio-Economic Policy Framework 2012-2015, as well as Government's reform agenda. New resources through loans, grants and technical assistance were primarily directed to the key areas of: road infrastructure, policy and institutional reform, as well as improved fiscal and public sector management, including public financial management.

There was a 250.2 per cent increase in new ODA compared with 2012, mainly attributed to the Government signing an arrangement under the Extended Fund Facility (EFF) with the International Monetary Fund (IMF). This arrangement facilitated complementary commitments of US$1.0 billion ($100.8 billion) in resources from the Inter-American Development Bank (IDB) and the International Bank for Reconstruction and Development (IBRD) – The World Bank over the period of the EFF. The conclusion of this agreement as well as the Cabinet approving the Government's Public Financial Management Reform Action Plan (PFMRAP) resulted in the resumption of budget support from the Multilateral Financial Institutions (MFIs)[5]; with the release of US$190.0 million ($19.1 billion) in quick disbursing loans from the World Bank and the IDB and US$56.6 million ($5.7 billion) in grant resources from the European Union (EU). Additionally, the Government signed a loan of US$300.0 million ($30.2 billion) with the People's Republic of China (PRC) for the Major Infrastructure Development Project (MIDP). This brought the value of the PRC portfolio to US$1.0 billion ($100.8 billion), making China the largest bilateral partner, as well as the largest ODA loan source for the year.

Efforts continued to promote donor harmonisation and coordination in the provision of funding for projects in order to increase the efficiency and effectiveness of ODA. This was demonstrated in the joint design and preparation of the Public Sector Efficiency Programme (PSEP) financed by the EU, IDB and the PRC; and the Citizen Security and Justice Programme (CSJP) III supported by DFATD[6], Department for International Development (DFID) and IDB.

Funding support to the Economic Infrastructure sector accounted for 53.0 per cent or US$317.0 million ($31.9 billion) of total new ODA, due to new loan commitments by China to the MIDP. The Administrative, Social Infrastructure and Directly Productive sectors received the amount of US$158.7 million ($16.0 billion), US$ 118.4 million ($11.9 billion), and US$8.6 million ($866.6 million), respectively.

Total disbursement of new and ongoing ODA increased by 88.4 per cent compared with 2012, with loan and grant disbursements increasing by 54.3 per cent and 175.9 per cent, respectively. This was attributed to the quick disbursing loan resources under budget support from the MFIs and was most evident with the World Bank and EU portfolios that reflected a 500.0 per cent and 157.0 per cent increase, respectively. The increase in disbursements can also be attributed to the resumption of activities under the Jamaica Development Infrastructure Programme (JDIP) funded by the PRC.

Net flows[7] between Jamaica and its three main multilateral lending partners (IDB, CDB and World Bank) was US$81.6 million ($8.2 billion) compared with US$62.2 million

($6.3 billion) in 2012. Disbursements totalled US$280.2 million ($28.2 billion), while total repayment of principal, interest and other charges amounted to US$198.6 million ($20.0 billion), which resulted in an increase of 96.4 per cent in net flows compared with 2012. The increase in the net flow position reflected higher disbursements from the IDB and World Bank through quick disbursing budget support loans. Inclusion of the flows between Jamaica and the PRC increased total net flows to US$143.8 million ($14.5 billion).

SUSTAINABLE DEVELOPMENT & SCIENCE, TECHNOLOGY AND INNOVATION

SUSTAINABLE DEVELOPMENT (SD)

Sustainable development was advanced in Jamaica in accordance with the *Medium-term Socio-Economic Policy Framework 2012-2015*. Activities undertaken were primarily geared towards increasing the resilience of the natural environment, climate change adaptation, institutional capacity building, development planning, and geospatial data management. Among the activities were:

— establishment of the Climate Change Division within the Ministry of Water, Land, Environment and Climate Change (MWLECC) to coordinate national climate change activities

— successful completion of two climate change related programmes – the GOJ/EU/UNEP Climate Change Adaptation and Disaster Risk Reduction Programme (CCADRRP) which facilitated reforestation, coastal restoration, policy development and sustainable alternative livelihoods; and Phase I of the Pilot Programme for Climate Resilience (PPCR) which, among other things, expanded the hydro-meteorological network

2 Amounts are rounded to one decimal place.

3 The average exchange rate of US$1 = J$100.77 is used.

4 ODA is concessionary loans, grants and technical assistance to developing countries for the promotion of their economic development and welfare as its main objective.

5 These are institutions created by a group of countries that provide development financing for national development and include the Inter-American Development Bank, Caribbean Development Bank, the World Bank and the European Union, represented by the European Investment Bank and the European Commission.

6 DFATD is the result of the amalgamation in 2013 between the Canadian International Development Agency (CIDA) and the Department of Foreign Affairs and International Trade.

7 Net Flows equal Total Disbursements less Total Repayments.

— approval of the Climate Change Policy Framework and Action Plan by Cabinet and its tabling in Parliament as a Green Paper to guide the country's adaptation and mitigation agenda and to reduce the risks posed by climate change to all sectors and geographic regions

— assessment of forest cover change through change detection analysis using Geographic Information Systems (GIS) technology in the South-Negril Orange River Watershed

— promulgation of four Provisional Development Orders by the Town and Country Planning Authority to guide orderly development in specific areas.

Monitoring of environmental indicators showed that the status of coastal and marine ecosystems remained poor. The beaches monitored across 36 sites had a net erosion of 20.8m. The average coral reef health index (CRHI) for sites monitored was 2.1, showing that coral reefs in Jamaica are in poor condition. Despite this, there was evidence of building resilience in the natural environment through coastal restoration work, reforestation and better environmental management. This was demonstrated by an improvement in the country's score to 58.26 and a rank of 55 out of 178 countries on the Environmental Performance Index (EPI). Climate data indicated an increase in average annual temperature and decrease in average annual rainfall relative to previous years. As a result, drought affected many parishes, particularly St Elizabeth, the main food production area, where 9 of the 12 periods recorded drought. There were no hurricanes and associated natural disasters, and the number of fires declined marginally to 11 834. Notwithstanding this decline, fires resulted in the death of 19 persons (including five children) and injury to 70. The over 1 000 residential fires which occurred left 1 830 persons homeless.

SCIENCE, TECHNOLOGY AND INNOVATION (STI)

Jamaica's growth strategy continued to target issues of low levels of competitiveness, high energy costs and bureaucracy in business processes. Accordingly, the country's drive to create more competitive business structures, in keeping with *Vision 2030*, benefited from:

— the adoption of more than 50 national product and service standards, at least half of which were geared towards the Information and Communication Technology (ICT) sector

— an increase in the number of conformity assessment bodies accredited to ISO/IEC 17025:2005 or ISO 15189:2009 and companies certified to ISO 9001:2008 standard

— the attainment of 'consolidated state of the practice' status by the International Centre of Environmental and Nuclear Sciences (ICENS)for its Neutron Activation Laboratory, putting it on par with top performing laboratories across a number of regions.

Investments were made to stimulate growth in the ICT sector, including development of infrastructure, improved access to broadband services, adoption of service standards, and the launch of *eGov Jamaica Limited*, to provide ICT service to both public and private sector companies. The introduction of a number of e-government services, such as the One Stop Business Registration 'Super Form' (BRF1) and National Security Interests in Personal Property Registry for Jamaica (Collateral Registry) enhanced the ease of doing business.

Progress was made in the areas of science education and technology-enabled learning. The rollout of the Technology Enrichment Programme (TEP), an initiative of e-Learning Jamaica Company Limited (e-Ljam) contributed to improved performance in numeracy and literacy skills among students of the 30 targeted high schools. At the tertiary level, expanded programme offerings in science and engineering at the University of the West Indies (UWI) and the University of Technology (UTech) were achieved, in response to market demand.

THE ECONOMY

MACROECONOMIC POLICIES AND PERFORMANCE

Jamaica's macroeconomic policy framework was guided by the *Medium Term Socio-Economic Policy Framework (MTF)* for FY2012/2013–FY2014/2015 which is aligned with the Memorandum of Economic and Financial Policies (MEFP) which accompanied the EFF. The MTF outlines the strategies and initiatives to be pursued in the medium term and is aimed at facilitating a sustained reduction in the debt/GDP ratio and creating the conditions necessary to facilitate robust and sustained economic growth. The main components of the economic policy framework are:

— time bound fiscal consolidation, supported by fundamental fiscal and monetary policy reforms aimed at creating a stable, predictable and resilient macroeconomic environment

— time bound structural and business environment reforms aimed at significantly strengthening Jamaica's external competitiveness, thus facilitating growth and employment

— debt management operations that place public debt on a sustainable downward path while simultaneously ensuring financial stability

— actions to improve price and non-price competitiveness

— improved social protection programmes aimed at alleviating the adverse impact of fiscal adjustment on the most vulnerable.

The main economic performance targets as outlined in the MEFP, for FY 2013/14 are:

— real GDP of 0.8 per cent

— an inflation rate within the range of 8.5 per cent to 10.5 per cent

— a primary surplus of 7.5 per cent of GDP

— a NIR stock of US$1 234.7 million.

In addition to the quantitative targets, key structural benchmarks were also established for FY 2013/14. These included:

— the adoption of a fiscal rule which is to be incorporated in the FY2014/15 budget

— tabling of a Charities Bill and the Omnibus Tax Incentives Act to eliminate ministerial discretionary powers to grant or validate any tax relief and institute a transparent regime for limited tax incentives

— establishment and operation of a central collateral registry.

Other commitments included:

— tabling an Insolvency Act

— streamlining the Business Registration process through the use of a multi-use registration instrument

— the establishment of flexible work arrangements

— the establishment of HEART/NTA workforce colleges.

Economic Performance

During 2013, real GDP for the Jamaican economy grew by 0.2 per cent relative to 2012. This out-turn resulted from respective increases of 0.4 per cent and 0.1 per cent in the Goods Producing and Services Industries, respectively. For the first half of the year, real GDP contracted by 0.7 per cent, reflecting:

— unfavourable weather conditions, in particular the lagged impact of Hurricane Sandy[8] and drought conditions which prevailed during January–April

— weak business confidence due to protracted negotiations between the Government of Jamaica (GOJ) and the IMF for the establishment of a loan agreement under the EFF

— weak external economic conditions, which resulted in subdued demand for Jamaican goods and services.

However, for July–December, the economy expanded by 1.1 per cent, reflecting the impact of improved weather conditions; a strengthening in the external demand for some Jamaican goods and services; and an expansion in construction-related activities.

For April–December 2013, Central Government operations generated a ***fiscal deficit*** of $19.6 billion compared with a budgeted deficit of $24.8 billion. This improved out-turn reflected lower than planned Expenditure which outweighed the shortfall in Revenue & Grants. The fall in Revenue & Grants, relative to budget was attributed to declines in collections from Tax Revenue, Non-Tax Revenue, Bauxite Levy and Capital Revenue. Additionally, a primary surplus of $61.7 billion was recorded, $0.1 billion higher than budgeted.

Jamaica's ***merchandise trade deficit*** was US$4 658.7 million which represented a worsening of US$56.0 million relative to 2012. This reflected a 9.7 per cent fall in exports which outweighed a 1.8 per cent decline in expenditure on imports. The decline in exports was due to lower receipts for six of the ten product categories. The largest decline was recorded for Chemicals which fell by US$115.1 million due to lower exports of ethanol.

At the end of 2013, the ***foreign exchange rate*** was $106.38 per US$1.00, representing a nominal depreciation of 12.6 per cent. This represents a real depreciation of the Jamaica dollar relative to the US dollar of 4.4 per cent.

The Bank of Jamaica lowered the interest rate payable on its 30-day Certificate of Deposit on February 25, 2013. This was consistent with the decline in rates on domestic instruments subsequent to the successful completion of the National Debt Exchange. The cash reserve and liquid assets requirements were maintained at 12.0 per cent and 26.0 per cent, respectively. Notwithstanding this, the Central Bank continued to offer special longer dated operations and introduced special repurchase agreements to augment its liquidity management operations during the year.

The point-to-point inflation for December 2013 was 9.5 per cent, 1.5 percentage points higher than the rate recorded for 2012. Inflationary impulses stemmed mainly from:

— higher transport-related expenses

— pass-through of the depreciation of the domestic currency

— the impact of adverse weather-related conditions

— the impact of higher international crude oil prices

— revenue enhancement measures implemented by the government.

The inflation out-turn was, however, tempered by weak domestic demand conditions and lower telephone rates.

SECTORAL PERFORMANCE

GOODS PRODUCING INDUSTRIES

Agriculture

Real GDP for the Agriculture, Forestry and Fishing industry declined by 0.5 per cent during 2013. There were contractions in three of the five sub-industries. The decline in output was mainly attributed to: (a) the lingering effects of Hurricane Sandy, which occurred in October 2012; and (b) drought conditions during January-April 2013 which reduced productive activities. The industry's share of GDP was 6.7 per cent, 0.1 percentage point lower than in 2012.

The government employed a number of strategies during 2013 to foster growth in the industry. These included the continuation of programmes aimed at improving efficiency by offering farmers support in the areas of marketing, irrigation and extension services. This involves the expansion of the agro parks concept, which seeks to combine public and private partnership to develop productive and marketing infrastructure to improve productivity, quality and competitiveness. The government also implemented measures such as the Drought Mitigation Programme and the Hurricane Sandy Recovery Programme aimed at mitigating the effects of the adverse weather conditions.

The Planning Institute of Jamaica's Agriculture Production Index indicated that gross output for the sub-industries Animal Farming, Traditional Export Crops and Post Harvest Activities declined by 1.1 per cent, 17.3 per cent and 6.4 per cent, respectively. The sub-industries Other Agricultural Crops and Fishing increased by 1.5 per cent and 35.0 per cent, respectively.

The was an increase in export earnings from traditional agricultural commodities. Earnings were valued at US$22.1 million compared with US$20.0 million in 2012. The

8 Hurricane Sandy occurred in October 2012.

increase in earnings was due to improved earnings from Citrus (Fresh Fruit) which increased by 76.5 per cent to US$3.3 million and Coffee which grew by 18.5 per cent to US$16.3 million.

Mining and Quarrying

Real value added for the Mining and Quarrying industry increased by 3.8 per cent which represented an increase of 0.1 percentage point in contribution to GDP to 2.3 per cent. This performance was due to higher output of alumina as crude bauxite output declined. The increase in the production of alumina was influenced by a higher global demand for aluminium. This was reflected in the increased output from West Indies Alumina Company (WINDALCO) and Jamaica Alumina Company (JAMALCO) plants. Production challenges, which affected output at JAMALCO in 2012 into the first quarter of 2013, were addressed by April–June 2013. This resulted in increased output of alumina relative to 2012.

The higher global consumption of aluminium also influenced the increased volume of alumina exports from Jamaica. Shipments to North America accounted for the increased demand of the commodity with Canada recording the highest volume of any of Jamaica's shipment destinations.

Earnings from the export of bauxite and alumina grew by 3.5 per cent to US$644.6 million. This out-turn was largely impacted by the increase in the volume of alumina exported as the volume of exported crude bauxite and the average export prices of both commodities declined.

There was a decline in the performance of the Industrial Minerals subsector (Quarrying) which was due mainly to declines in production of five of the ten commodities.

Manufacture

The Manufacture industry contracted by 0.8 per cent relative to 2012 and represented the second consecutive annual decline, and accounted for 8.4 per cent of GDP. This reflected declines in the Food, Beverages & Tobacco and Other Manufacturing components. The fall-off in the Food, Beverages & Tobacco component was mainly driven by lower production of sugar, molasses, beer and animal feeds. For the Other Manufacturing component, decline was primarily attributed to reduced output within the Petroleum Products and Chemicals & Chemical Products categories. There were closures of three chemical plants in response to reduced demand for locally manufactured sulphuric acid, sulphonic acid and detergent. Further decline in the industry was tempered mainly by higher production of: (i) Non-Metallic Minerals (cement) due to an uptick in building construction; and (ii) Alcoholic Beverages.

Earnings from total manufacture exports fell from US$938.9 million to US$772.5 million in 2013 and emanated from lower earnings from both Traditional and Non-traditional exports. This reflected reduced earnings for all commodities in Traditional exports; as well as for four of nine categories in Non-Traditional Exports.

Construction

The Construction industry grew by 1.8 per cent in 2013 and accounted for 7.1 per cent of GDP. This performance was attributed to increases in Building Construction and Other Construction subcategories which accounted for 95.0 per cent of the overall industry. The improved performance in Building Construction was due to an increase in Residential activities, evidenced by the higher volume of housing starts; and the increased value of mortgages disbursed. An increase in civil engineering activities by National Road Operating and Construction Company Limited (NROCC) and the National Water Commission (NWC) influenced the performance of the Other Construction subcategory.

The improved out-turn by the industry was reflected in some inputs such as the supply of cement and labour. The supply of cement grew by 15.7 percent to 808.1 kilo tonnes while the average number of persons employed to the industry increased by 2.4 percent to 83 025 person.

SERVICES INDUSTRIES

Energy, Electricity and Water

The Electricity & Water Supply industry fell by 2.0 per cent relative to 2012, reflecting reductions in both electricity consumption and water production. Lower demand was the main cause for contraction in electricity consumption, while drought conditions were among the factors contributing to the decline in water production.

Electricity generation increased by 0.1 per cent to 4 141.6 GWh compared with 2012. This was impacted by a 16.7 per cent increase in output from non-Jamaica Public Service (JPS) sources to 1 799.5 GWh, as production from JPS fell by 9.7 per cent to 2 342.2 GWh. The increased output was supported by operations of the new West Kingston Power Plant (WKPP), which was commissioned into service in 2012. Electricity sales fell by 2.1 per cent to 3 025.8 GWh, due mainly to reduced demand while revenue grew by 8.5 per cent to $110.1 billion. The higher revenue resulted from increases in the rates charged and the number of customers on the grid.

The National Water Commission produced approximately 298 029.9 megalitres of water, a reduction of 1.5 per cent relative to 2012. This reflected lower output from Kingston, St. Andrew & St. Thomas and Other parishes. The total amount of water consumed for the year fell by 2.3 per cent to 92 286.2 megalitres, caused mainly by drought conditions experienced during January to April 2013. Non-revenue water represented 70.0 per cent of total production, an increase from 69.0 per cent in 2012. The number of connections expanded by 1.2 per cent to 459 563. Revenue rose by 1.5 per cent to $22.3 billion, attributable to tariff adjustments effected during the year.

Transport, Storage and Communication

The Transport, Storage & Communication industry grew by 0.2 per cent relative to 2012, stemming from an increase in the Communication segment which outweighed a decrease in the Transport and Storage segment. Competition in the telecommunications subcategory, which resulted in an increase in the number of minutes sold to consumers, was the main factor contributing to this expansion. The total number of telephone subscribers expanded relative to 2012, pushed by growth in the number of mobile users, as the number of fixed lines declined.

A reduction in activities at the island's seaports and the relatively flat performance in airport activities translated to a decline of the Transport & Storage segment, as evidenced by:

— a decrease of 2.5 per cent to 15 081 thousand tonnes of cargo handled at the ports

— a decrease of 2.6 per cent to 3 572 in ship calls to the ports.

These outweighed the increase of 1 840 passengers at the island's international airports.

There was a decrease of 8.4 per cent to 54.8 million in the pieces of mail handled by the Post & Telecommunications Department in 2013. However, revenue and expenditure grew by 19.7 per cent to $1.6 billion and by 11.8 per cent to $1.8 billion, respectively. This resulted in an improvement in the deficit to $335.0 million compared with $393.0 million reported in 2012.

Finance & Insurance Services

Real value added for the Finance & Insurance Services industry grew by an estimated 0.5 per cent. This performance stemmed largely from the following developments:

— an increase in net interest income at commercial banks

— higher revenue generated from fees, service charges and commission

— an increase in net premium income at insurance companies

— a rise in returns earned from investments

The advancement of the Finance & Insurance Services industry was, however, adversely impacted by the NDX as companies earned less interest on their investments. Additionally, the Jamaica Stock Exchange (JSE) Main Market declined by 12.5 per cent.

Hotels & Restaurants

The real value added for the Hotels & Restaurants[9] industry grew by an estimated 0.9 per cent and accounted for 5.6 per cent of GDP in 2013. This was due to increased stopover arrivals. The increase in stopover arrivals largely reflected more visitors from the United States of America (USA) and Europe. The improved performance from two of Jamaica's main source markets was the result of the recovery from the negative impact of Super Storm Sandy on visitors from the USA during 2012; and the introduction of flights from the Czech Republic and Russia.

Cruise passenger arrivals fell by 4.2 per cent to 1 265 268. This contraction reflected reduced activities at the Montego Bay and Ocho Rios cruise piers, as the number of passengers to the Falmouth Cruise Pier increased. The number of ship calls to the island's ports also decreased, moving to 360 from 384 in 2012.

Provisional tourist expenditure amounted to US$2 077.1 million, 0.4 per cent more than in 2012. Of this amount, stopover visitors expended US$1 975.5 million while cruise passengers spent US$101.5 million. For 2012, stopover expenditure amounted to US$1 967.9 million and cruise passenger expenditure totalled US$101.7 million.

The average annual employment in the Hotels and Restaurants industry was 75 750 persons compared with 76 250 persons during 2012. This represented approximately 7.0 per cent of total employment for both 2013 and 2012.

Wholesale & Retail Trade; Repair & Installation of Machinery

The WRTRIM industry contracted by 0.1 per cent and accounted for 17.6 per cent of GDP. The industry's performance was influenced by lower business and consumer confidence as well as reduced government spending resulting from fiscal consolidation efforts. Further, a contraction in the value of imports and lower gross sales also negatively impacted the industry. Analysis of preliminary General Consumption Tax (GCT) data indicated that six of the nine goods categories recorded lower sales. These were: Food, Beverages & Tobacco; Automobiles, Commercial & Transport Equipment; Textiles, Clothing and Shoes; Furniture, Furnishings, Office Equipment & Jewellery; Electronics, Musical & Photography Equipment; and Other Manufactured Goods.

Distributive trade activities continued to be governed through the Fair Trading Commission, Consumer Affairs Commission, Bureau of Standards Jamaica and the Trade Board, with the aim of ensuring a modern commercial system with competitive markets; the protection of consumer rights; and adherence to regulatory standards.

Entertainment & Sports

The Other Services Industry – of which the Recreational, Cultural and Sporting (RCS) sub-industry accounts for the largest share – recorded growth of 0.1 per cent in real value added for 2013. Improvements were also recorded for several indicators, which are used to track the annual performance of the sub-industry. Of note were: higher real gross sales by entertainment categories; increases in the number of amusement licences issued and revenue collected from their issuance; higher capital expenditure on creative industry projects; and growth in financial support to and investment in entertainment and sport activities. Policy developments in 2013 included the tabling of the National Sport Policy in Parliament; and the establishment of a Sport Tourism Committee to market the sport component of Brand Jamaica, thereby positioning sports and related activities as major economic components in the development of Jamaica.

THE SOCIAL SECTOR

DEMOGRAPHICS AND THE LABOUR MARKET

Population

The population at the end of 2013 was estimated at 2 718 000, with a growth rate of 0.2 per cent. The rate of natural increase was 7.8 per 1 000 persons and this is as a result of 36 700 births, 15 400 deaths and net external movements of 14 700. Among the three fundamental processes influencing population age and structure, migration continues to play an integral role in impacting population growth.

Jamaica is currently at the intermediate stage of the demographic transition. This is marked by declining birth rates and relatively low death rates, resulting in an ageing population. The effects of an ageing population structure are evident in the declining 0–14 age group (24.0 per cent), and an increasing working age (15–64 years) and dependent

9 This industry captures most of tourism's direct contribution to real value added.

elderly (65+) population, 67.4 per cent and 8.6 per cent, respectively.

Efforts to incorporate population into all policies, plans and programmes continued throughout the year. These include the development of a draft Jamaica Diaspora Policy; finalization of the National Policy and Plan of Action on International Migration and Development; capacity building and strengthening of the Civil Registration and Vital Statistics System (CVRS); and completion of the National Report on the Review and Appraisal of the Implementation of the International Conference on Population Development Programme of Action.

Labour Market

The labour market continued to be shaped by developments in the economy and population demographics in 2013. The average employment level grew by 0.5 per cent in 2013 relative to 2012, partly in response to the recovery of the economy. However, the unemployment rate rose by 1.3 percentage points to 15.2 per cent as there was an increase in the labour force.

The labour force grew by 2.1 per cent to 1 308 650, of which males accounted for 54.5 per cent (702 975). The increase in the labour force reflected an increased working age population and an increase in the labour force participation rate (that is, a decline in the persons that were outside the labour force).

The statistics also indicated the need for policies and programmes aimed at increasing the number of persons in the labour force with training and certification. Some 68.0 per cent of the labour force reported having received no training compared with 68.9 per cent in 2012. The number of Professionals with a Degree or Diploma was recorded as being 13.5 per cent (176 225) of the labour force while only 11.0 per cent received Vocational Training with Certificate.

Efforts toward a reformed labour market continued with the tabling of the Ministry Paper on the implementation of flexible work arrangements in Jamaica. It is expected that full implementation will take place by mid-2014. Discussions also commenced on setting an agenda for comprehensive labour market reform starting with the establishment of a Labour Market Reform Commission.

HUMAN DEVELOPMENT, WELFARE AND CULTURE

Education and Training

During 2013, the major priorities of the Ministry of Education (MoE) continued to be in the areas of Early Childhood Development, Special Education, Media and ICT in Education, Teacher Quality, Tertiary Education and the infusion of Technical Vocational Education and Training (TVET) in the school system. Other areas of focus included: the elimination of the shift system; the introduction of a High School Diploma Equivalency Programme for adult learners; and the strategic alignment of Science, Technology, Engineering and Mathematics (STEM) in schools using age-appropriate methodologies.

There were improved students' performances in national and regional examinations. These included the Grade Four Literacy Test, the Grade Six Achievement Test (GSAT), the Caribbean Secondary Education Certificate (CSEC) and the Caribbean Advanced Proficiency Examination (CAPE).

For the 2013/2014 Fiscal Year, the Government of Jamaica (GOJ) made an increased allocation of $85.7 billion to the MoE for recurrent and capital expenditure representing 17.1 per cent of the National Budget. The Government committed itself to an arrangement under the International Monetary Fund Extended Fund Facility which proposes to reform expenditure in education with emphasis on the balancing of student-teacher ratio within and between schools, and improving the funding structure of the student loan scheme to facilitate increased access to tertiary level training.

An estimated 75.0 per cent (806 332 persons) of the school-age cohort (3–24 years old) were enrolled for the 2012/13 academic year. The total number of students enrolled in the public and private education institutions at the pre-primary, primary and secondary levels was 655 855. Gross Enrolment Rates (GER) for the cohorts were 99.9 per cent at pre-primary, 99.4 per cent at primary, and 91.9 per cent at secondary. In training institutions, the number of persons trained in the Professional, Senior Officials and Technicians category was 16 595 (69.0 per cent female) while 65 646 persons (61.0 per cent female) were trained as "skilled and semi-skilled personnel".

Health

Priorities of the Ministry of Health (MOH) during the year included: improving maternal and child health; prevention and control of non-communicable diseases; renewed primary health care; strengthening of the national health information system; and improving the estimate of accounting for the effective efficient delivery of health care. The MOH continued its efforts in providing quality of care by improving access to services through the primary health care renewal programme. Greater focus was evident in this area with the establishment of four Centres of Excellence, one within each regional health authority to improve access to health care services.

Data from the Jamaica Survey of Living Conditions (JSLC) revealed that more than 80 per cent of Jamaicans reported good or very good health; 32.4 per cent of the ill/injured did not visit health care providers; 22.3 per cent reported inability to afford health care despite the No User-fee Policy and approximately 19.5 per cent of Jamaicans had health insurance coverage. The issue of sustainable financing in health remained a challenge particularly in the area of financing for the National HIV/AIDS Programme.

Jamaica progressed in achieving health-related targets of halting the spread of HIV/AIDS, malaria and tuberculosis (TB). After successful implementation of the Malaria Re-elimination Programme, Jamaica is once again on the official register of areas where malaria eradication has been achieved. National focus was placed on the prevention and control of non-communicable diseases through the implementation of the WHO Framework Convention on Tobacco Control symbolically marking the awareness of the effects of tobacco smoke.

Social Development, Social Protection & Culture

Vision 2030 Jamaica remained the guiding social policy framework for actions at the legislative, policy and programme levels. Despite fiscal constraints, government sought to maintain and improve upon social gains, particularly for vulnerable population groups. An assessment of the achievement of the Millennium Development Goals was initiated, which recognized attainment of targets in primary education, access to

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reproductive health services, and the spread of HIV/AIDS, while identifying deficits in the areas of maternal and child mortality, and poverty reduction.

Attention was placed on the implementation of the National Policy for Gender Equality and the mainstreaming of gender throughout the public sector. Considerations were also given to increasing the awareness of the public on the effects of gender-based violence, and promoting women's political and economic leadership. Significant strides were made in the review of the Adoption Act, the Child Care and Protection Act, the Disabilities Bill and the National Youth Policy.

Social protection, as an integral aspect of the country's growth strategy, was given close attention at the policy and programme levels. A comprehensive Social Protection Strategy was drafted, the objective being to provide a conceptual framework and structure for a strengthened social protection system. An exit and graduation strategy for households on welfare was further defined within the year, and awaited the analysis of recertification results for finalization.

Government established a focal point for the coordination of poverty reduction efforts, with the immediate objective being to frame a revised Policy and Programme to reflect priority issues. Social and economic inclusion, recognition of rights, promotion of improved quality of life, and enhancement of training and empowerment opportunities were the key thrusts in human capital development for the various age groups. The continued strengthening of social institutions, development of community infrastructure, and consolidation of governance systems, were the focus of community activities. Social development projects at family, community and national levels were again strongly supported by the involvement of the private sector, civil society groups and other non-government organizations. Funding and technical assistance continued to be provided through international agencies and development partners.

National Security and Justice

The incidence of crime and violence continued to decline, notwithstanding an increase in the number of reported murders. There was another change in the classification of crimes, with the term 'Major crimes' being replaced with 'Category 1' crimes. This new classification differs from the previous one with the inclusion of aggravated assault and the removal of sexual intercourse with someone less than 16 years of age. The Jamaica Constabulary Force (JCF) maintained its focus on managing crime and violence through a number of initiatives, including the implementation of a Violence Reprisal Risk Ranking system. At the same time, the Bureau of Special Investigations, the Anti-Corruption Branch and the Inspectorate of Constabulary conducted various investigations into the actions of police officers. The JCF also continued to promote community safety through the establishment of a mobile police post in five communities in Spanish Town. The policing component of community safety was further enhanced through the implementation of a number of community-level social intervention programmes such as the Citizens' Security and Justice Programme. The Unite for Change Initiative was launched as a coordination framework for violence prevention initiatives and to oversee the implementation of the National Crime Prevention and Community Safety Strategy (NCPCSS). The revision of the National Security Policy was completed. The revised policy proposes a four-tier system to identify threats facing Jamaica and proposes six key reforms to address tier one threats.

The South Camp Juvenile Correctional Centre became operational during the year and houses female juveniles who were previously located at the Fort Augusta Adult Correctional Centre and the Diamond Crest Juvenile Correctional Centre. In an effort to reduce the number of cases of attempted suicide, a suicide/self-harm policy was developed and juveniles were sensitized about the issue. Work continued under the justice sector reform programme with the implementation of the Justice Undertakings for Social Transformation programme (JUST). Implementation of the National Plan of Action on Child Justice also commenced, and the draft National Child Diversion Policy completed and consultations held. In addition, a number of Restorative Justice Facilitators were trained in Child Rights and Responsibilities to facilitate implementation of the National Child Diversion Programme. Additionally, improvements to the legislative framework continued with several pieces of legislation being enacted or amended, while others were at various stages in the process.■

CHAPTER 1

INTERNATIONAL ECONOMY

INTRODUCTION

Global economic activities increased during 2013, evidenced by growth in output, trade and foreign direct investment. Increased output was attributed to expansions in global industrial production, private consumption and investment, facilitated by accommodating monetary and fiscal policies. Growth in output continued to be driven by Emerging Market Economies, particularly China, though at a declining rate. Advanced Economies also recorded improved performances, led by the United States of America (USA). Consistent with the increase in output, was an expansion in trade, evidenced by increases in the value and volume of goods and services traded. Higher Foreign Direct Investment (FDI) flows were pushed by increased cross-border mergers and acquisitions as the level of greenfield[1] investments remained unchanged.

The pace of growth was, however, weaker than initially anticipated, given the realization of several downside risks. Among these were a slowing in the rate of growth of Emerging Market Economies and continued weak economic conditions in the Euro Area. Further improvement in global economic performance was also stymied by uncertainty regarding the fiscal and monetary policies of some Advanced Economies.

Relative to 2012, both energy and non-energy commodity prices declined. Energy prices were constrained by subdued demand conditions associated with concerns about weakened prospects of the global economy and anticipated monetary tightening measures. The decline in non-energy prices reflected mainly, the impact of improved supply prospects brought about by favourable weather conditions and adequate inventory levels.

The focus of the World Trade Organization's (WTO) multilateral trade negotiations during 2013 was on completing a trade agreement on a sub-set of issues within the Doha Development Round. At the 9th Ministerial Conference, WTO members adopted the Bali Package which involved a series of decisions aimed at improving trade facilitation through, streamlining trade; allowing Least Developed Countries (LDCs) more options for food security; and increasing LDCs trade and development.

INTERNATIONAL ECONOMIC CONDITIONS

World Output

The global economy grew by an estimated 3.0 per cent during 2013 (Table 1.1). Growth was pushed primarily by the performance of Emerging Market & Developing Economies which recorded growth of 4.7 per cent, led by the performance of Developing Asia. Advanced Economies grew by a 1.3 per cent increase in output, due mainly to economic growth in the United States of America (USA), the world's largest economy. Increased global economic activity was largely due to:

— expansions in global industrial production and world trade driven by higher levels of private consumption and investment

— facilitative monetary conditions, such as those which existed in the economies of Japan and the USA where the authorities actively pursed monetary and fiscal measures to encourage growth. These measures included: (i) Quantitative Easing[2] (QE) as was conducted by the Federal Reserve of the USA, which, in its third round (QE3) purchased US$85.0 billion worth of mortgage backed securities monthly; and (ii) Fiscal Stimulus as in the case of Japan in which the government increased spending on infrastructure and disaster recovery to complement its other economic measures.

The pace of global growth, however, was weaker than initially forecast reflecting largely the combined impact of several adverse developments, among which were:

— Lower than anticipated growth of Emerging Market & Developing Economies – the slowdown in growth of these economies resulted from a combination of: (i) the waned impact of monetary and fiscal stimuli implemented subsequent to the 2008/2009 global financial crisis; (ii) structural and capacity constraints which caused bottlenecks in the business environment; (iii) subdued commodity prices; and (iv) weak external demand.

— Prolonged weak performance of the Euro Area – GDP declined in the region, consequent on lower demand, which was constrained by fiscal austerity, relatively high unemployment levels, weak corporate balance sheets, and subdued exports.

— Uncertain economic conditions – prolonged US bi-partisan fiscal policy and debt ceiling delibera-

1 The term greenfield refers to investments in physical business operation facilities where none previously existed.

2 Quantitative Easing (QE) is an unconventional type of monetary policy in which the central bank purchases a specified amount of financial securities from the market in order to increase money supply and lower interest rates. This is used when standard monetary policy becomes ineffective when short-term interest rates are at or approaching zero per cent. In the USA a third round of quantitative easing (QE3) was announced in September 2012.

tions fuelled speculation that failure to find a solution would not only be detrimental to the US economy but also to the global economy through spill over effects. Additionally, indications by the Federal Reserve in May 2013 was that a tapering off of bond purchases under its QE3 programme was imminent in the short-term – a first step to phasing out its monetary stimulus programme. As a consequence, financial market volatility increased, as the market reacted to an expected tightening in global financial conditions. For Advanced Economies, long-term interest rates increased. In the case of Emerging Market Economies, higher interest rates in Advanced Economies coupled with weaker than anticipated economic growth led to capital outflows, lower equity prices and currency depreciation.

— Fiscal sustainability risks – persistently high debt ratios within an environment of lower than projected growth rates in Advanced Economies[3] as well as the absence of a clearly specified programme to address this challenge, added to the uncertainty in the global macroeconomic environment. This was compounded by widening fiscal deficits in Emerging Market Economies.

These developments led the International Monetary Fund (IMF) to repeatedly revise downwards its projections for global growth in 2013. Growth was initially revised in April to 3.3 per cent from 3.5 per cent in January, and then to 3.1 per cent in July. In October, the IMF further revised downwards its global growth projection to 2.9 per cent. These revisions reflected lower forecasts for both Advanced Economies and Emerging Market & Developing Economies.

Among Advanced Economies, growth was led by the performance of the USA which recorded increased output of 1.9 per cent. This out-turn was due to higher levels of private consumption and investment. The increase in household consumption was due to increased wealth associated with the continued recovery in the real estate market and improvements in the labour market. Growth was also supported by accommodative financial conditions evidenced by an increase in credit disbursed, and an easing in bank lending conditions, associated with the QE3 programme which facilitated low interest rates.

Further growth was stymied by: (i) fiscal consolidation, reflecting lower expenditure at both the federal and state levels; and (ii) prolonged bi-partisan negotiations about the level of debt and government spending. Unable to reach a consensus in Congress[4] with respect to the fiscal budget for 2013/2014, there was a shutdown of the Federal Government on October 1. This shutdown which lasted for 16 days, resulted in the temporary suspension of several non-essential functions of government due to a lack of authorized funding. As a consequence, approximately 800 000 Federal employees were furloughed and another 1.3 million required to work without known payment dates. The Federal Government reopened on October 17, 2013 with a deal to fund the government through to January 15, 2014 and extend government's ability to borrow until February 14, 2014.

Growth of Canada's economy was estimated to be 1.7 per cent. Increased economic activities were due to higher levels of Consumer Spending supported by an increase in Business Investment. The upturn in Consumer Spending was reflected in increased household expenditure on both goods and services. Business expenditure was driven by an expansion in non-residential construction as well as higher investment in machinery and equipment. Growth was also supported by increased exports.

The Japanese economy grew by 1.7 per cent during 2013, pushed mainly by increased consumer spending as well as an uptick in private and public investments. This out-turn resulted from initiatives to support growth and end deflation, namely, quantitative easing and increased fiscal stimuli. These initiatives were complemented by structural reforms which included investment tax incentives and deregulation of the Agriculture and Electricity sectors.

The Euro Area remained in recession for the second consecutive year (down 0.4 per cent), with 8 of the 17 member economies contracting. Among those contracting were, Italy, Spain, the Netherlands, Cyprus and Greece. During 2013, countries in the region continued to encounter challenging conditions as firms and households encountered weak balance sheets and income prospects due to subdued demand associated with relatively high unemployment levels and low export demand. These conditions further exacerbated the impact of fiscal austerity programmes–adopted to address high debt levels–on economic growth. Despite these challenges, the rate of contraction in the troubled economies slowed as risks subsided due to policy actions[5] taken during 2012. These actions resulted in more sustainable sovereign borrowing costs, lower private borrowing costs and a stabilization of bank deposits. This improvement was brought about by policy implementation progress in reducing the risks associated with unsustainable high debt levels and banking sector fragility.

Real GDP for the United Kingdom (UK) economy increased by 1.7 per cent relative to 2012. Growth was driven mainly by the Services Industry in which all sectors recorded an increase in value added. The largest contributors to growth during the year were the Business Services & Finance and Distribution, Hotels & Restaurants sectors. Further growth was constrained by declines in output of the Agriculture; Extraction; and Electricity, Gas & Air Industries.

Emerging Market & Developing Economies recorded growth, which was driven mainly by the 7.7 per cent growth of China's economy. The increased GDP recorded for China reflected:

3 International Monetary Fund projected 2013 debt to GDP ratios for some Advanced Economies were as follows: USA, 108.5 per cent; Euro Area, 106.0 per cent; and Japan, 243.5 per cent.

4 The Constitution of the US requires that all federal expenditure be authorized by congress with the President's approval. The fiscal year of the Federal Budget Process runs from October 1 to September 30.

5 These policy actions included, the Outright Monetary Transaction and the Long-term Refinancing Operation undertaken by the European Central Bank.

TABLE 1.1
ANNUAL PER CENT CHANGE IN GLOBAL OUTPUT AND TRADE, 2008 - 2014

	2008	2009	2010	2011[r]	2012[r]	2013[p]	2014[proj]
REAL GDP							
World Output	2.8	-0.6	5.1	3.9	3.1	3.0	3.7
Advanced Economies	0.2	-3.2	3.2	1.7	1.4	1.3	2.2
United States of America	0.0	-2.6	3.0	1.8	2.8	1.9	2.8
Canada	0.5	-2.5	2.3	2.5	1.7	1.7	2.2
Japan	-1.2	-5.2	4.4	-0.6	1.4	1.7	1.7
Euro Area	0.5	-4.1	1.9	1.5	-0.7	-0.4	1.0
Germany	1.0	-4.7	3.6	3.4	0.9	0.5	1.6
France	0.1	-2.5	1.4	2.0	0.0	0.2	0.9
Italy	-1.3	-5.0	1.5	0.4	-2.5	-1.8	0.6
United Kingdom	-0.1	-4.9	2.1	1.1	0.3	1.7	2.4
Other Advanced Economies	1.7	-1.2	5.8	3.2	1.9	2.2	3.0
Regional Groups							
Emerging Market & Developing Economies	6.0	2.5	7.3	6.2	4.9	4.7	5.1
Developing Asia	7.7	6.9	9.5	7.8	6.4	6.5	6.7
China	9.6	9.1	10.4	9.3	7.7	7.7	7.5
Middle East, North Africa & Pakistan	5.0	2.0	4.3	3.9	4.1	2.4	3.3
Latin America & the Caribbean	4.3	-1.7	6.1	4.6	3.0	2.6	3.0
Commonwealth of Independent States (CIS)	5.3	-6.5	4.6	4.8	3.4	2.1	2.6
TRADE IN GOODS AND SERVICES							
World Trade (volume)	2.9	-11.0	12.8	6.1	2.7	2.7	4.5
Exports (volume)							
Advanced Economies	1.9	-12.4	12.3	5.7	2.0	2.7	4.7
Emerging & Developing Economies	4.6	-7.8	13.6	6.8	4.2	3.5	5.8
Imports (volume)							
Advanced Economies	0.4	-12.7	11.7	4.7	1.0	1.4	3.4
Emerging & Developing Economies	9.0	-8.2	14.9	8.8	5.7	5.3	5.9

r - revised
p - preliminary estimate
proj - projections

Source : IMF - WORLD ECONOMIC OUTLOOK - Update, January 2014

— Investment in Fixed Assets, reflecting a rise in investment from both state-owned enterprises and private firms

— Retail Sales, due to an expansion in household wealth

— Industrial Production, driven mainly by higher output levels in Mining and Manufacturing.

This growth rate was the lowest since 1999 and resulted from deliberate attempts by the Chinese leadership to redirect the main source of growth towards domestic consumption and away from being primarily investment driven. This reflected concerns that the investment fuelled growth in China, would lead to financial instability and increased contingent fiscal liabilities. Whilst this policy change will lead to lower growth in the short to medium-term, in the long-term it is expected to facilitate higher living standards and lead to more sustainable growth. Lower growth of China's economy and the related decline in the level of imports, however, adversely impacted other Emerging Market Economies particularly those dependent on primary commodity exports.

Driven by higher export growth and increased output of the Agriculture, Manufacture and Construction industries, India recorded growth of 3.8 per cent. Further growth was stymied by supply constraints which tempered manufacturing and construction activities. The ASEAN-5 countries[6] recorded growth of 5.0 per cent, supported by exports and domestic demand.

Output from Latin America & the Caribbean (LAC) was estimated to have grown by 2.6 per cent, led by the larger economies of Brazil and Mexico. Growth was mainly the result of an increase in domestic consumption and a rise in investment, particularly in machinery and equipment. Within the Caribbean specifically, growth was lower than that recorded for the Latin America & Caribbean region. Contributing to the subdued economic performance in the Caribbean were weak fiscal positions which resulted in high public debt levels; weak external accounts associated with high energy imports; low competitiveness; and a fall-off in tourism. These challenges were tempered by increased raw material exports and more favourable weather conditions which facilitated improved output in the Agriculture

6 Indonesia, Malaysia, Philippines, Thailand and Vietnam.

industry. Commodity exporting countries such as Trinidad & Tobago and Guyana recorded the largest increases in GDP. The out-turn for Jamaica was relatively flat while Barbados recorded a contraction.

Economic activities in the Middle East & North Africa increased by 2.4 per cent. Growth was however tempered by slowing in the growth rates of oil-producing countries as oil production was disrupted by social upheavals and unscheduled maintenance activities. This was exacerbated by extended political transitions from one leadership to the next and geo-political tensions.

World Trade

The total volume of goods and services traded globally during 2013 increased by an estimated 2.7 per cent. This increase was spurred by growth in household consumption in addition to the demand of firms for raw material and capital goods. The out-turn was the same as recorded during 2012 and reflected a higher rate of growth for both the exports and imports of Advanced Economies. Export volumes for Advanced Economies increased by 2.7 per cent relative to 2.0 per cent during 2012, while imports grew by 1.4 per cent compared with 1.0 per cent. For Emerging Market Economies, exports and imports increased, though at a declining rate (see Table 1.1).

The total value of goods and services traded was estimated to be US$23 164 billion, an increase of 2.8 per cent. Of this total, Goods exports amounted to US$18 709 billion, an increase of US$407 billion relative to 2012. The total value of Services traded increased by US$220 billion to reach US$4 455 billion. World trade prices, denominated in US dollars, for manufactured goods increased by 0.2 per cent. In contrast, primary commodity prices denominated in US dollars declined, with oil prices falling by 0.5 per cent and non-fuel commodity prices by 1.5 per cent.

The terms of trade of Advanced Economies and Emerging Market & Developing Economies declined by 0.3 per cent and 0.6 per cent, respectively. The larger decline for Emerging Market Economies reflected a faster decrease in the prices of primary commodities, their main exports, relative to the increase in the prices of manufactured goods, the main export of Advanced Economies.

Inflation

During the year, lower average inflation was recorded for Advanced Economies, while average inflation in Emerging Market & Developing Economies increased. Prices were driven mainly by seasonal factors and the impact of domestic policies. The upward movement in global prices was, however, tempered by subdued food and energy commodity prices and restrained demand associated with high unemployment levels.

In Advanced Economies, inflation averaged 1.4 per cent, 0.6 percentage point below the rate recorded during 2012. The UK recorded the highest rate of 2.7 per cent, while the USA and Canada recorded respective rates of l.4 per cent and 1.1 per cent (Table 1.2). Japan with a rate of 0.0 per cent, continued to have the lowest inflation.

On average, inflation in Emerging Market Economies stood at 6.2 per cent. The higher rate, relative to Advanced Economies, reflected in part, the impact of structural challenges such as energy shortage and efficiency; higher inflation expectations; and changes in subsidy programmes. The regions recording averages greater than the overall were Middle East & North Africa, (12.3 per cent); Latin America & the Caribbean (6.7 per cent); and the Commonwealth of Independent States (6.5 per cent). Developing Asia recorded the lowest regional rate, 5.0 per cent (see Table 1.2).

Employment Trends

The slow pace of global recovery adversely impacted labour market developments. Whilst the rate of unemployment remained unchanged at 6.0 per cent, the

TABLE 1.2
ANNUAL AVERAGE PER CENT CHANGE IN CONSUMER PRICES 2008-2013

	2008	2009	2010	2011	2012[r]	2013 [proj]
Advanced Economies	3.4	0.1	1.5	2.7	2.0	1.4
United States of America	3.8	-0.3	1.6	3.1	2.1	1.4
Japan	1.4	-1.4	-0.7	-0.3	0.0	0.0
Germany	2.8	0.2	1.2	2.5	2.1	1.6
France	3.2	0.1	1.5	2.1	2.2	1.0
Italy	3.5	0.8	1.6	2.9	3.3	1.6
United Kingdom	3.6	2.1	3.3	4.5	2.8	2.7
Canada	2.4	0.3	1.8	2.9	1.5	1.1
Memorandum:						
European Union	3.6	0.9	2.0	3.1	2.6	1.7
Emerging & Developing Economies	9.2	5.2	6.1	7.2	6.1	6.2
Developing Asia	7.5	3.0	5.7	6.5	4.7	5.0
Middle East & North Africa	13.5	6.7	6.9	9.7	10.8	12.3
Latin America & the Caribbean	7.9	6.0	6.0	6.6	5.9	6.7
Commonwealth of Independent States	15.6	11.2	7.2	10.1	6.5	6.5

r - revised
proj - projected

Source : IMF - WORLD ECONOMIC OUTLOOK, October 2013

TABLE 1.3a
GLOBAL UNEMPLOYMENT RATE BY REGIONS 2007 - 2013

	2007[r]	2008[r]	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]
World	5.5	5.6	6.2	6.1	6.0	6.0	6.0
Developed Economies & European Union	5.8	6.1	8.4	8.8	8.4	8.6	8.6
Central & South-Eastern Europe & CIS	8.2	8.1	9.9	9.2	8.5	8.0	8.2
East Asia	3.8	4.3	4.4	4.2	4.3	4.4	4.5
South-East Asia & the Pacific	5.5	5.2	5.1	4.7	4.4	4.1	4.2
South Asia	4.1	4.1	4.2	3.8	3.8	3.9	4.0
Latin America & The Caribbean	6.9	6.5	7.5	7.3	6.7	6.6	6.5
Middle East	10.2	10.1	10.3	11.1	10.8	10.9	10.9
North Africa	11.1	10.5	10.6	10.4	11.8	12.1	12.2
Sub-Saharan Africa	7.5	7.7	7.7	7.6	7.6	7.6	7.6

r - revised
p - preliminary estimate

Source: ILO, Global Employment Trends, January 2014

number of unemployed persons increased by approximately 5.0 million to 201.8 million. These developments indicated that employment opportunities were insufficient to absorb the increase in the labour force. For males, the unemployment rate stood at 5.8 per cent, relative to 5.7 per cent recorded during 2012, while the rate for females remained unchanged at 6.4 per cent.

During 2013, the unemployment out-turn varied across regions and countries. Among Emerging & Developing Countries, North Africa (12.2 per cent) and the Middle East (10.9 per cent) had the highest unemployment rates (Table 1.3a). Contributing to the sustained high unemployment rates in these countries were structural labour market challenges such as, low participation rates for women and high levels of informality. For other Emerging Market & Developing Regions unemployment rates have returned to or have fallen below pre-crisis levels. These included South East Asia & the Pacific (4.2 per cent); Latin America & the Caribbean (6.5 per cent); and Sub-Saharan Africa (7.6 per cent) {Table 1.3a}.

Within Developed Economies & European Union, unemployment was most severe in the Euro Area (Table 1.3b). The highest employment rate in the Euro Area was recorded by Greece (27.0 per cent), followed by Spain (26.9 per cent), Portugal (17.4 per cent) and the Slovak Republic (14.4 per cent). In contrast unemployment in the USA, though still above pre-crisis (calendar year 2007) levels, declined to 7.6 per cent relative to 8.1 per cent in 2012.

Other developments in the global labour market during 2013 included:

— a lengthening of unemployment periods, particularly in Advanced Economies, this was reflective of low job creation and was evident in the EU, where unemployment periods doubled. Long periods of unemployment threaten the recovery of the labour market as the longer an individual is unemployed the more difficult it is to find a job

— the youth continued to be disproportionately affected by the weak macroeconomic environment, with approximately 74.5 million persons aged 15-24 unemployed, an increase of approximately one million. The unemployment rate for jobseekers aged 15-24 years was 13.3 per cent relative to 12.9 per cent during 2012. In contrast, the unemployment rate for adults stood at 4.6 per cent relative to 4.5 per cent during 2012. This high unemployment amongst the youth was particularly evident in North Africa; the Middle East; Developed Economies & the European Union; and Latin America & the Caribbean.

TABLE 1.3b
UNEMPLOYMENT RATE FOR INDUSTRIALIZED COUNTRIES (Per Cent) 2007-2013

UNEMPLOYMENT RATE (per cent)	2007	2008	2009	2010[r]	2011[r]	2012[r]	2013[e]
Advanced Economies	5.4	5.8	8.0	8.3	7.9	8.0	8.1
United States of America	4.6	5.8	9.3	9.6	8.9	8.1	7.6
Japan	3.8	4.0	5.1	5.1	4.6	4.4	4.2
Euro Area	7.5	7.6	9.4	10.1	10.2	11.4	12.3
Germany	8.4	7.4	7.5	7.1	6.0	5.5	5.6
France	8.3	7.9	9.4	9.8	9.6	10.3	11.0
Italy	6.1	6.8	7.8	8.4	8.4	10.7	12.5
United Kingdom	5.4	5.5	7.5	7.9	8.0	8.0	7.7
Canada	6.0	6.2	8.3	8.0	7.5	7.3	7.1

r - revised
e - estimated

Source : IMF - WORLD ECONOMIC OUTLOOK, October 2013

INTERNATIONAL TRADE POLICY

World Trade Organization (WTO)

Multilateral trade negotiations regarding the Doha Development Round[7] remained unsettled. The objective of the WTO for 2013 was to finalize negotiations on selected issues, such as special and differential treatment of Least Developed Countries (LDCs), in the Doha Development Round. Against this background, WTO members in December, 2013, adopted the 'Bali Package' at the Ninth Ministerial Conference held in Bali, Indonesia. The Package involved a series of decisions related to:

— Trade Facilitation – this agreement is designed to expedite trade and lower the cost of trading across borders through, simplifying customs procedures so as to reduce the bureaucracy associated with moving goods through customs and facilitate greater transparency

— Agriculture – the agreement on Agriculture had two main components: (i) public stockholding programmes[8], which are meant to ensure food security, were sanctioned in the interim[9]; and (ii) a deal on tariff-rate quota administration which guides how a specific type of import quota is to be handled when the quota is consistently under filled. It was agreed that members would consult and provide information when quotas were under filled.

— Trade and Development in Least Developed Countries[10] (LDCs) – the package of agreements for LDCs included: (i) free access for LDCs to export to richer countries; (ii) simpler rules of origin for LDCs so as to make it easier for these countries to identify their goods and qualify for preferential treatment; and (iii) a waiver on services, allowing LDCs easier access to the services markets of richer countries.

CARICOM

The work of CARICOM during the year included the following: (i) deliberations on the free movement of CARICOM nationals; (ii) continued efforts to implement Cariforum-Economic Commission (EC) Partnership Agreement (EPA); and continued preparations for the establishment of a free trade area between CARICOM and Canada. With respect to the free movement of nationals, the Caribbean Court of Justice (CCJ) delivered its landmark ruling in the case ***Shanique Myrie vs the State of Barbados (Defendant) and Jamaica (Intervener) [2013] CCJ 3 (OJ)***. Ms. Myrie, a Jamaican, brought an action against Barbados, alleging a breach of CARICOM law, namely, her right to free movement. The court ruled in favour of the Jamaican. It found, among other things, that she was wrongfully denied entry into Barbados, thus breaching her right to enter a member state "…without harassment or the imposition of impediments …". This right was derived from the revised Treaty of Chaguaramas as well as a Decision taken at a 2007 Conference of Heads of Government of CARICOM. The CCJ also stipulated conditions for the processing of CARICOM nationals entering other member states.

CARIFORUM-Economic Commission (EC) Economic Partnership Agreement (EPA)

CARICOM states continued to make preparations for the implementation of various sections of the EPA. Jamaica in particular, submitted to the CARICOM Secretariat its Implementation Matrix, which provides the broad framework and guidelines within which the process will take place. The next step will be to the development of a Work Plan, outlining Jamaica's steps going forward.

CARIFORUM/Canada

CARICOM continued work towards establishing a free trade area and development agreement with Canada. Towards this end, internal consultations were held on textual proposals within the meetings of the technical working groups (TWGs). Among the TWGs to have held consultations during the year were Services & Investment; Market Access; and Institutional Issues & Dispute Settlement.

INTERNATIONAL COMMODITY MARKETS

Against a background of improved supply conditions and lower than anticipated global growth which resulted in relatively subdued demand, commodity prices trended downwards. This was evident in respective declines of 0.2 per cent and 7.1 per cent in the World Bank's Energy and Non-Energy Commodity Price Indices.

The average spot price of crude oil stood at US$104.1/barrel relative to US$105.0/barrel in 2012 (Table 1.4). The movement in price was due to demand and supply factors. On the demand side, prices were influenced downwards by macroeconomic concerns about the state of the global economy given uncertainty in some Advanced Economies; less than projected performance of Emerging Market Economies; and cuts in government spending in the face of high fiscal burdens. Supply factors were related to supply disruptions in Libya and Iraq and geopolitical developments, in particular, concerns that the Syrian conflict would spread to the Gulf and cause a disruption in supplies and discontent about the Iranian nuclear programme.

Movement in the average spot price reflected the combined effect of declines in two of the three benchmark prices and an increase in the third, as indicated below:

— UK Brent, averaging US$108.9/barrel, a decline of 2.8 per cent

7 The Doha Development Round of trade negotiations was officially launched among WTO members in 2001. Its aim is to reform the global trading system through lowering trade barriers, thus increasing trade. Since 2008, discussions have stalled as member countries remain divided on several issues such as agriculture, non-tariff barriers and services.

8 Programmes whereby governments purchase food from farmers at administered/supported prices, to build up stocks, for food security purposes.

9 The interim solution will exist until a permanent one is agreed, with a four-year work programmed established to conclude this issue.

10 A Least Developed Country as determined by the United Nations is one which is at a very low level of socio-economic development as measured the Human Development Index.

TABLE 1.4
SELECTED COMMODITY PRICE DATA, 2007 - 2013, US$

Commodity	Price per unit	2007	2008	2009	2010	2011	2012	2013	% Change 2013/2012
Crude Oil (Average Spot)	$/bbl	71.1	97.0	61.8	79.0	104.0	105.0	104.10	-0.9
Coffee, arabica	$/kg	2.72	3.08	3.17	4.32	5.98	4.11	3.08	-25.1
Coffee, robusta	$/kg	1.91	2.32	1.64	1.74	2.41	2.27	2.08	-8.4
Bananas, EU	$/kg	1.04	1.19	1.15	1.00	1.12	1.10	1.02	-7.3
Bananas, US	$/kg	0.68	0.84	0.85	0.87	0.97	0.98	0.92	-6.1
Oranges	$/kg	0.96	1.11	0.90	1.03	0.89	0.87	0.97	11.5
Sugar, US	$/kg	0.46	0.47	0.55	0.79	0.84	0.64	0.45	-29.7
Sugar, World	$/kg	0.22	0.28	0.40	0.47	0.57	0.47	0.39	-17.0
Sugar, EU	$/kg	0.68	0.70	0.52	0.44	0.45	0.42	0.43	2.4
Aluminum	$/mt	2 638.0	2 573	1 665	2 173	2 401	2 023.00	1 847.00	-8.7
Maize	$/mt	163.70	223.10	165.50	185.90	291.70	298.40	259.40	-13.1
Sorghum	$/mt	162.70	207.80	151.10	165.40	268.70	271.90	243.30	-10.5
Wheat, US HRW	$/mt	255.20	326.00	224.10	223.60	316.30	313.20	312.20	-0.3
Phosphate Rock	$/mt	70.90	345.60	121.70	123.00	184.90	185.90	148.10	-20.3
Potassium Chloride	$/mt	200.20	570.10	630.40	331.90	435.30	459.00	379.20	-17.4
Urea	$/mt	309.40	493.00	249.60	288.60	421.00	405.40	340.10	-16.1

Source: The World Bank, Commodities Price Data, January 2014

— Dubai, averaging US$105.4/barrel, down 3.2 per cent

— West Texas Intermediate, averaging US$97.4, up 4.0 per cent.

The disparity in the movement of WTI prices relative to other benchmark prices stemmed from a decline in crude oil stocks in the USA. This was due to the increased use of new pipelines carrying oil from Cushing, Oklahoma to refineries on the Gulf Coast.

The lower Non-Energy Commodities index reflected the decline in the prices of Beverages, Agricultural Commodities, Metals & Minerals and Fertilizers. Factors contributing to the downward trend in prices included:

— improved supply conditions due to favourable weather conditions

— weak demand associated with lower than anticipated global growth.

Coffee Arabica prices averaged US$3.08/kg and Coffee Robusta US$2.08/kg, reflecting respective declines of 25.1 per cent and 8.4 per cent. These declines resulted from higher exports from South America and Asia facilitated by record levels of production particularly from Brazil and Vietnam, the largest producers.

Favourable weather conditions, increased acreage, and higher yields resulted in a decline in grain prices. Among the grains recording lower prices were:

— Maize, which averaged US$259.40/mt, down 13.1 per cent – due to increased production by the US, Russia, India and the European Union. Record production in the USA reflected cooler summer temperatures and an extended growing season, which facilitated higher than expected yields. This was against the background of a heat wave during the summer of 2012, which caused considerable damage to the crop in the Midwestern region of the USA.

— Wheat (US HRW), which averaged US$312.20/mt, a decrease of 0.3 per cent – consequent on an increase in global stocks, reflecting higher production levels in Canada, USA, Australia and the EU. Output levels in the EU increased as production rebounded from the debilitating drought conditions which adversely impacted yields during 2012.

Metal prices fell due to an expansion in supplies and weak demand conditions. Specifically, aluminium prices reached US$1847/mt, the lowest annual average since 2009. The downturn in price reflected mainly high inventory levels at the London Metal Exchange. Despite an increase in demand, particularly from China, global demand was constrained by macroeconomic concerns about the slow pace of global growth.

Fertilizer prices declined, reflecting contractions in the price of all three components – Phosphate Rock (down 20.3 per cent); Potassium Chloride (down 17.4 per cent); and Urea (down 16.1 per cent) {see Table 1.4}. These declines stemmed from a decline in production costs, consequent on the moderation in the price of natural gas, a key ingredient.

INTERNATIONAL FINANCIAL MARKETS

Foreign Direct Investment (FDI) increased by 10.9 per cent to US$1.5 trillion, during 2013 (Table 1.5). This reflected increased flows to all economic groupings as follows:

— Developed Economies – up 11.6 per cent to US$576 billion

— Developing Economies – up 6.2 per cent to US$759 billion

— Transition Economies – up 44.8 per cent to US$126 billion.

The countries receiving the largest FDI inflows during 2013 were the USA, China, Russian Federation, British Virgin Islands Hong Kong, China and Canada.

Increased FDI inflows to Developed Economies were driven by the uptick in inflows to the Europe Union. The trend in Europe was largely due to inflows to Belgium, Ireland, the Netherlands and Luxembourg as a result of a

TABLE 1.5
GLOBAL FOREIGN DIRECT INVESTMENT INFLOWS, 2011 - 2013, US$Billion

	2011[r]	2012[r]	2013[e]	% Change 2013/2012
World	1691.0	1317.0	1461.0	10.9
Developed Economies	866.0	516.0	576.0	11.6
Europe	521.0	236.0	296.0	25.4
European Union	473.0	207.0	286.0	38.2
North America	267.0	211.0	223.0	5.7
Developing Economies	729.0	715.0	759.0	6.2
Africa	46.0	53.0	56.0	5.7
Latin America & the Caribbean	242.0	250.0	294.0	17.6
Developing Asia	439.0	409.0	406.0	-0.7
Transition Economies	96.0	87.0	126.0	44.8

r - revised
e - estimated

Source: UNCTAD - Global Investment Trends Monitor, January 2014

TABLE 1.6
CAPITAL FLOWS TO EMERGING MARKET & DEVELOPING COUNTRIESa, 2008-2013, US$ Billion

	2008[r]	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]
Latin America & The Caribbean						
Net Private Capital Flows	80.5	61.3	130.5	200.4	136.2	117.4
Net Official Flows	3.7	44.7	48.3	24.7	62	53.6
Change in Reserves[b]	-0.2	-24.9	-66.2	-85.9	-31.4	1.6
Sub-Saharan Africa						
Net Private Capital Flows	21.0	14.4	-16.3	-2.5	14.9	30.2
Net Official Flows	11.3	19.6	33.2	30.8	33.6	32.3
Change in Reserves[a]	-14.8	8.1	-1.7	-21.0	-19.1	-16.8
Developing Asia						
Net Private Capital Flows	35.9	207.9	390.5	366.5	110.4	265.5
Net Official Flows	-4.1	31.7	31.4	10.7	19.4	14.4
Change in Reserves[b]	-479.6	-467.9	-571.2	-439.9	-134.2	-414.6
Central & Eastern Europe						
Net Private Capital Flows	157.2	31.1	83.0	94.2	62.2	83.2
Net Official Flows	20.1	49.5	35.3	22.4	16.6	-0.6
Change in Reserves[b]	-7.0	-33.8	-37.1	-12.5	-23.7	-11.9
Middle East & North Africa						
Net Private Capital Flows	4.2	30.6	9.5	-95.5	-45.5	-30.1
Net Official Flows	-89.7	-16.1	-49.1	-83.6	-132.1	-166.4
Change in Reserves[b]	-186.6	23.3	-96.4	-132.0	-166.5	-113.2
Commonwealth of Independent States						
Net Private Capital Flows	-97.6	-63.4	-25.4	-63.9	-41.1	-67.9
Net Official Flows	-19.3	42.4	1.4	-17.5	0.7	1
Change in Reserves[b]	26.7	-7.2	-52.1	-23.8	-33.6	10.4
Total						
Net Private Capital Flows	201.1	281.9	572.0	499.3	237.1	398.4
Net Official Flows	-78.0	171.8	100.5	-12.4	0.2	-65.6
Change in Reserves[b]	-661.4	-496.5	-824.6	-715.1	-408.4	-544.5

a - This comprises net direct investment, net portfolio investment, other net official and private financial flows, and changes in reserves.
b - minus indicates an increase
p - projected
r - revised

Source : IMF - WORLD ECONOMIC OUTLOOK, October 2013

more tax-friendly environment for investment. Additionally, other European countries such as Germany, Spain and Italy experienced an expansion in FDI flows. Within North America, the increase in FDI flows was due to an expansion in inflows to Canada, as that to the USA declined. The increase recorded by Canada was brought about by a rise in intra-company loans to foreign affiliates located in that country.

Within Developing Economies, Latin America & the Caribbean received the largest increase, 17.6 per cent to US$294 billion in FDI inflows. This was driven mainly by higher receipts by Mexico, due to the acquisition of a brewery, and the British Virgin Islands, in which inflows were also due to an aquisition. Inflows to Africa reached US$56.3 billion, an increase of 5.7 per cent, reflecting mainly improved performance of Southern African countries. The increase in inflows to Developing Economies was tempered by a US$3.0 billion decline to US$406 billion received by Asia. The increase in FDI inflows to Transition Economies reflected higher inflows to the Russian Federation of 83.0 per cent to US$94.0 billion.

During the year, there was a decline in Official Flows to Emerging Market & Developing Countries. This reflected an increase in repayments as well as a fall-off in multi-lateral loans subsequent to the increase which immediately followed the global economic and financial crisis of 2008/2009. The regions recording a decrease in Net Official Flows were Latin America & the Caribbean; Sub-Saharan Africa; and Developing Asia (Table 1.6). While those regions repaying greater than received included Central & Easter Europe and the Middle East & North Africa.

OUTLOOK

The IMF projects global growth of 3.7 per cent for calendar year 2014. This is predicated on improved economic out-turns for Advanced Economies (2.2 per cent) and Emerging Market Economies (5.1 per cent). The USA is expected to lead Advanced Economies with growth of 2.8 per cent. Growth in economic activity is to be supported by an increase in private domestic demand associated with a rise in household wealth and continued improvements in the real estate market. It is anticipated that the Euro Area economy will strengthen during 2014, with projected growth of 1.0 per cent. This is predicated on a reduction in the pace of fiscal consolidation and improved business confidence which should augur well, particularly, for the most troubled economies in the region. Within the United Kingdom, growth is expected, based on more relaxed credit conditions and an increase in confidence. Growth of 1.7 per cent is projected for Japan due to new expansive fiscal measures and monetary easing.

Within Emerging Market & Developing Economies, China is projected to grow by 7.5 per cent. This projected rate of growth is lower than for 2013, reflecting the Chinese authorities' pursuit of policies to limit credit growth and raise the cost of capital. Also in Asia, economic activity in India is projected to expand, benefiting from structural policies aimed at supporting investment. Other Emerging Market Economies are also expected to grow, influenced by the general uptick in global economic activities.

FDI inflows are expected to increase during 2014. This should result from GDP growth, increased gross fixed capital formation, and higher trade volumes, which may encourage transnational corporations to increasingly engage in new investments.

Risks to these projections are on the downside given several existing and emerging challenges. Despite improved growth prospects Advanced Economies are still faced with high debt levels and are likely to pursue strategies for medium-term fiscal adjustment, thus constraining demand. Additionally, the recovery in private demand is expected to be slow, amidst continued high unemployment levels and household indebtedness which is likely to temper household spending. Given that the Federal Reserve of the USA is expected to taper its monetary easing programme, Emerging Market & Developing Economies will be vulnerable to financial and capital flow volatility. ■

CHAPTER 2

OFFICIAL DEVELOPMENT ASSISTANCE

INTRODUCTION

Agreements with International Development Partners (IDPs) totalling US$3.1 billion[1] ($312.4 billion)[2] for new and ongoing Official Development Assistance (ODA)[3] continued to support the goals and objectives outlined in the Medium Term Socio-Economic Policy Framework 2012-2015, as well as Government's reform agenda. New resources through loans, grants and technical assistance were primarily directed to the key areas of road infrastructure, policy and institutional reform, as well as improved fiscal and public sector management, including public financial management.

There was a 250.6 per cent increase in new ODA compared with 2012, mainly attributed to the Government signing an arrangement under the Extended Fund Facility (EFF) with the International Monetary Fund (IMF). This arrangement facilitated complementary commitments of US$1.0 billion ($100.8 billion) in resources from the Inter-American Development Bank (IDB) and the International Bank for Reconstruction and Development (IBRD)—The World Bank—over the period of the EFF. The conclusion of this agreement as well as the Cabinet approving the Government's Public Financial Management Reform Action Plan (PFMRAP) resulted in the resumption of budget support from the Multilateral Financial Institutions (MFIs)[4]; with the release of US$190.0 million ($19.1 billion) in quick disbursing loans from the World Bank and the IDB and US$56.6 million ($5.7 billion) in grant resources from the European Union (EU). Additionally, the Government signed a loan of US$300.0 million ($30.2 billion) with the People's Republic of China (PRC) for the Major Infrastructure Development Project. This brought the value of the PRC portfolio to US$1.0 billion ($100.8 billion), making China the largest bilateral partner, as well as the largest ODA loan source for the year.

Total disbursement of new and ongoing ODA increased by 88.4 per cent compared with 2012 and was directly attributed to the quick disbursing resources under budget support from the MFIs. This was most evident with the World Bank and EU portfolios that reflected a 500.0 per cent and 157.0 per cent increase, respectively. The increase in disbursements can also be attributed to the resumption of activities under the Jamaica Development Infrastructure Programme (JDIP) funded by the PRC.

Efforts continued to promote donor harmonisation and coordination in the provision of funding for projects in order to increase the efficiency and effectiveness of ODA. This was demonstrated in the joint design and preparation of the Public Sector Efficiency Programme (PSEP) financed by the EU, IDB and the PRC, and the Citizen Security and Justice Programme (CSJP) III supported by Department of Foreign Affairs and International Trade (DFATD)[5], Department for International Development (DFID) and IDB. Donor coordination was further enhanced through the approval of the PFMRAP; donor coordination meetings for the Health, Education, Public Financial Management (PFM) and Security sectors; and a

BOX 2.1 ODA, PUBLIC FINANCIAL MANAGEMENT & DONOR COORDINATION

The issue of public financial management (PFM) has been a prominent feature of development assistance in Jamaica since the early 2000s when the use of the budget support modality gained momentum. The use of this modality, through which resources are transferred to the Consolidated Fund[I], gave rise to increased scrutiny of the quality of the Government's systems for management of these resources. Development partners providing budget support wanted to ensure high levels of budget credibility, transparency and budget oversight therefore government accounting practices gained prominence.

By 2011, 76.0 per cent of new ODA to Jamaica was in the form of budget support, with over 400 conditions directly related to improvements in PFM. A second Public Expenditure and Financial Accountability (PEFA) assessment was conducted in 2012 which showed less than anticipated improvements in PFM despite over a decade of reforms, largely supported through loans and grants. The 2012 PEFA assessment showed that the reforms being

cont'd ➔

1 Amounts are rounded to one decimal place.

2 The average exchange rate of US$1 = J$100.77 is used.

3 ODA is concessionary loans, grants and technical assistance to developing countries for the promotion of their economic development and welfare as its main objective.

4 These are institutions created by a group of countries that provide development financing for national development and include the Inter-American Development Bank, Caribbean Development Bank, the World Bank and the European Union, represented by the European Investment Bank and the European Commission.

5 (DFATD) is the result of the amalgamation in 2013 between the Canadian International Development Agency (CIDA) and the Department of Foreign Affairs and International Trade.

Box 2.1 cont'd

undertaken were not adequately sequenced, partly due to the plethora of conditions which were being pursued in parallel. Government's response was the preparation of a Public Financial Management Reform Action Plan (PFMRAP) which was approved by Cabinet in October 2013. In 2013, the first Government-led coordination of development partners' assistance in the area of PFM, was initiated on the basis of the PFMRAP. PFM conditions and new programmes are being designed specifically to address the areas of weakness identified in the 2012 PEFA assessment and identified for support in the PFMRAP. The PFMRAP is designed as a comprehensive, sequenced reform programme to which any ODA for PFM should be aligned.

[I] The Consolidated Fund is the principal Government account to which all Government revenues must be deposited and from which expenditure, via warrants, is withdrawn.

diagnostic report drafted to inform an aid effectiveness strategy for the Government. (See Box 1 for details.)

The Government continued to engage non-traditional partners such as Botswana, Colombia and Brazil to harness development assistance from emerging economies and foster South-South cooperation in areas such as Agriculture, Local Government Reform, Sports, Cultural Cooperation, and Technical and Scientific Cooperation.

The GOJ, with technical assistance from the World Bank, commenced efforts to improve the public investment management system through the strengthening of the procedures, tools, institutions and governance mechanisms. A Public Investment Improvement Action Plan which was approved by the Cabinet in October 2013 was developed to guide implementation of these measures and will be the backbone of a strengthened Public Investment Management System.

The IDPs provided support to the Government's growth agenda through further commitments resulting from the EFF with IMF. This was reflected in the development of the draft World Bank country strategy which will be aligned to *Vision 2030 Jamaica – National Development Plan* with an overarching focus on creating conditions for sustainable and inclusive growth while promoting social protection.

Financing

Total ODA[6]

Funding for new and on-going projects and programmes totalled US$3.1 billion ($312.4 billion) of which 61.1 per cent came from the MFIs, 38.4 per cent from bilateral partners and 0.5 per cent from Multilateral Technical Cooperation agencies (MTCs). Loans amounted to US$1.8 billion ($181.4 billion) and grants totalled US$560.1 million ($56.4 billion). Counterpart contribution amounted to US$740.6 million ($74.6 billion) for loans and US$2.3 million ($ 231.8 million) for grants.

The sectoral distribution of the loans and grants for development assistance was as follows:

— Administrative[7], US$603.7 million ($60.8 billion) which mainly represented budget support and public financial management programmes

— Economic Infrastructure[8], US$ 966.4 million ($97.4 billion) funds were provided in this sector primarily to the rehabilitation of roads and gullies islandwide as well as rehabilitation of the potable water supply and sanitation services in Kingston and St. Andrew

— Social Infrastructure[9], US$545.3 million ($54.9 billion) support was provided primarily for social protection to include poverty reduction and payment of conditional cash transfers to PATH beneficiaries, as well as funding to the Students' Loan Bureau (SLB)

— Directly Productive[10], US$247.8 million ($25.0 billion) funding supported the agricultural sector through improved productivity in the banana industry, construction of irrigation systems and studies on agricultural competitveness.

Figure 2A shows the sectoral allocation of loans and grants for new and on-going development assistance.

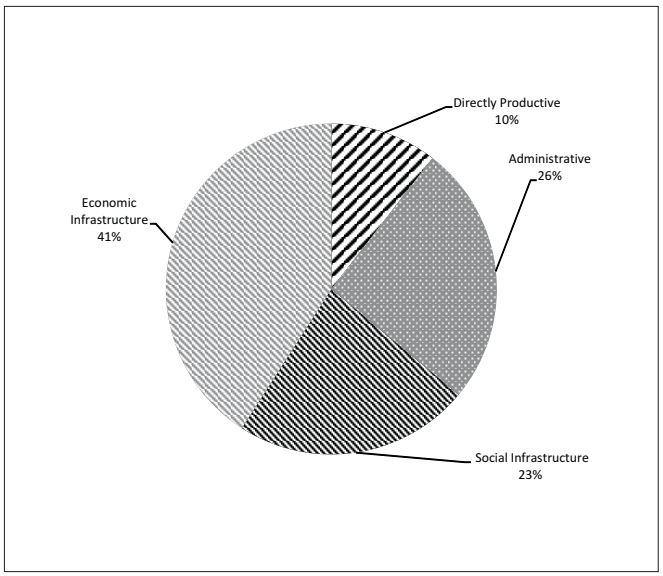

FIGURE 2A: SECTORAL ALLOCATION OF NEW AND ONGOING ODA, 2013

6 Total ODA refers to the sum of resources for ongoing and newly signed agreements.
7 Administrative – Fiscal and Public Sector Reform, Budgetary Support.
8 Economic Infrastructure – Transport, Power, Water, Sewerage.
9 Social Infrastructure – Health, Education, Housing, Safety Net.
10 Directly Productive – Agriculture, Tourism, Mining, Manufacturing, Micro, Small and Medium Business Enterprises

TABLE 2.1
SOURCES OF NEW OFFICIAL DEVELOPMENT ASSISTANCE, 2009-2013
US$MILLION

	2009			2010			2011			2012			2013		
	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total
Bilateral	508.0	59.8	567.8	160.5	47.6	208.1	0.0	52.8	52.8	0.0	37.5	37.5	311.0	57.2	368.2
Multilateral Financial	462.0	139.0	601.0	850.0	53.0	903.0	443.0	41.6	484.6	50.0	73.3	123.3	164.0	58.1	222.1
Multilateral Technical	0.0	9.4	9.4	0.0	12.2	12.2	0.0	4.2	4.2	0.0	11.2	11.2	0.0	12.4	12.4
Total	**970.0**	**208.2**	**1178.2**	**1010.5**	**112.8**	**1123.3**	**443.0**	**98.6**	**541.6**	**50.0**	**121.9**	**171.9**	**475.0**	**127.7**	**602.7**

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

New ODA[11]

New ODA of US$602.7 million ($60.7 billion) comprised loans and grants of US$ 475.0 million ($47.9 billion) and US$127.7 million ($12.9 billion) respectively (Table 2.1). This reflected a 250.6 per cent increase over the previous year due in part to the Government's access to new budget support from the MFIs (Figure 2B). The increase is also attributable to new resources from Bilateral partners which increased by 881.9 per cent to US$368.2 million ($37.1 billion), due primarily to the signing of loans totalling US$311.0 million ($31.3 billion) from the PRC and combined Bilateral grants of US$57.2 million ($5.8 billion). The year reflected a shift from three consecutive years of decline from bilateral sources, resulting in the portfolio being the largest for new assistance (Figure 2C).

New ODA from MFIs increased by 80.1 per cent to US$222.1 million ($22.1 billion) compared with 2012, with loans accounting for US$164.0 million ($16.5 billion) and grants totalling US$58.1 million ($5.9 billion). Loans from the MFIs increased by 228.0 per cent compared with the previous year resulting from the approval of budget support loans from the World Bank and IDB. Grant resources decreased by 20.7 per cent compared with the previous year.

New ODA from MTCs totalled US$12.4 million ($1.2 billion), an increase of 7.1 per cent compared with 2012 (Table 2.1). This was mainly attributable to the contributions from the Global Fund for HIV Aids and the UN Women organization.

SECTORAL ALLOCATION OF NEW ODA

The Economic Infrastructure sector accounted for 53.0 per cent or US$317.0 million ($31.9 billion) of total allocation of new ODA. The Administrative, Social Infrastructure and Directly Productive sectors received the amount of US$158.7 million ($16.0 billion), US$118.4 million ($11.9 billion), and US$8.6 million ($866.6 million), respectively (Figure 2D and Table 2.2).

MFIs accounted for 94.8 per cent of support to the Administrative sector, mainly for budget support programmes to advance public financial management and public sector efficiency. The MFIs were also the major source of new ODA

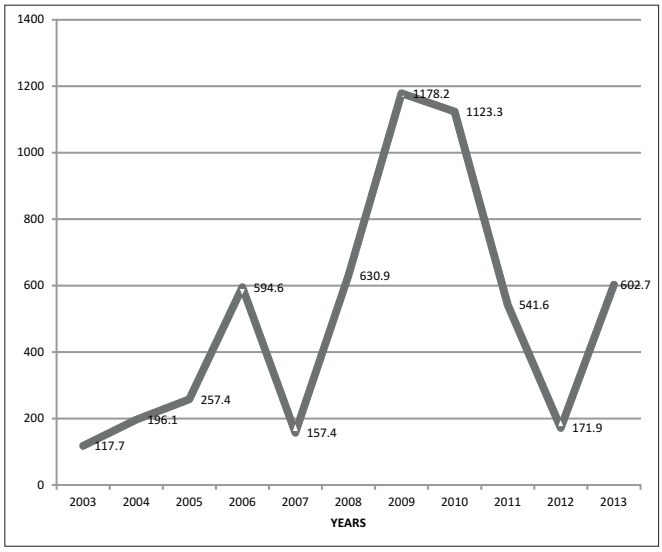

FIGURE 2B: APPROVED ODA 2003-2013

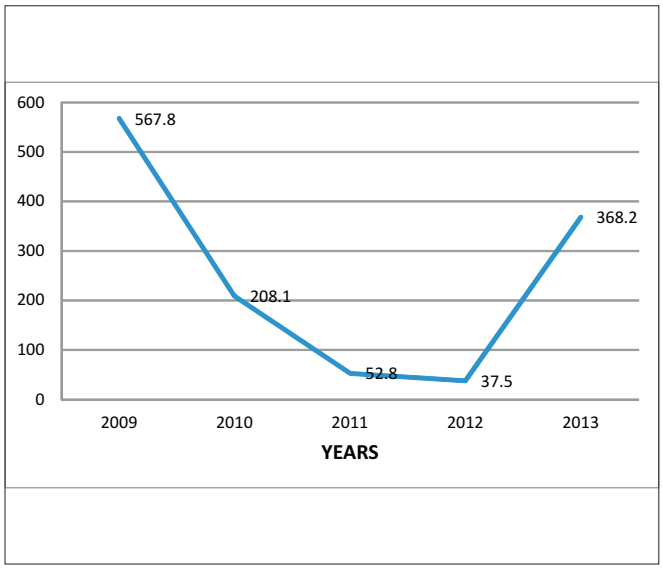

FIGURE 2C: ODA FROM BILATERAL SOURCES (2009-2013)

11 New ODA refers to agreements for concessionary loans, grants and technical assistance which were approved in 2013.

TABLE 2.2
SUMMARY OF 2013 OFFICIAL DEVELOPMENT ASSISTANCE (US$ MILLION)

International Development Partners	New ODA			Sectors for New ODA				Disbursements (New & On-going ODA)		
	Loan	Grant	Total	Directly Productive	Adminis-trative	Social Infrastructure	Economic Infrastructure	Loan	Grant	Total
MFI										
CDB	20.0	6.9	26.9			26.9		38.6	1.4	40.0
EU		50.4	50.4	6.5	6.5	37.4			56.6	56.6
IDB	14.0	0.8	14.8		14.0	0.8		101.4	2.9	104.3
IBRD	130.0		130.0		130.0			157.3		157.3
Sub-Total	**164.0**	**58.1**	**222.1**	**6.5**	**150.5**	**65.1**	**0.0**	**297.3**	**60.9**	**358.2**
BILATERAL										
Brazil	0.0	0.0	0.0						0.7	0.7
Canada	0.0	26.7	26.7		4.9	21.8			5.4	5.4
People's Republic of China	311.0	16.5	327.5			11.0	316.5	94.3		94.3
Japan	0.0	0.8	0.8			0.5	0.3		2.1	2.1
South Korea	0.0	0.4	0.4		0.2		0.2		2.7	2.7
United Kingdom	0.0	3.1	3.1		3.1				8.10	8.1
United States of America	0.0	6.1	6.1	1.0		5.1			15.2	15.2
Scholarships	0.0	3.6	3.6			3.6			3.6	3.6
Sub-Total	**311.0**	**57.2**	**368.2**	**1.0**	**8.2**	**42.0**	**317.0**	**94.3**	**37.8**	**132.1**
MTC										
CFTC	0.0	0.2	0.2			0.2			0.2	0.2
IAEA	0.0	0.5	0.5			0.5			0.5	0.5
PAHO	0.0	0.9	0.9			0.9			0.7	0.7
UNAIDS	0.0	0.0	0.0						0.1	0.1
FAO	0.0	0.7	0.7	0.7					0.3	0.3
OAS	0.0	0.1	0.1			0.1			0.3	0.3
UNESCO	0.0	0.5	0.5			0.5			0.5	0.5
UNICEF	0.0	1.6	1.6			1.6			0.9	0.9
UNFPA	0.0	0.1	0.1			0.1			0.1	0.1
UN Women	0.0	0.2	0.2			0.2			0.2	0.2
Global Fund	0.0	6.7	6.7			6.7			6.9	6.9
GEF Small Grants	0.0	0.4	0.4	0.4					0.2	0.2
UNDP	0.0	0.1	0.1			0.1			2.9	2.9
Scholarships	0.0	0.4	0.4			0.4			0.4	0.4
Sub-Total	**0.0**	**12.4**	**12.4**	**1.1**	**0.0**	**11.3**	**0.0**	**0.0**	**14.2**	**14.2**
TOTAL	**475.0**	**127.7**	**602.7**	**8.6**	**158.7**	**118.4**	**317.0**	**391.6**	**112.9**	**504.5**

Source: Planning Institute of Jamaica and International Development Partners

for the Directly Productive Sector, accounting for 75.6 per cent of total resources. This was mainly channelled to the banana industry.

Bilateral funding was the only source of new ODA for the Economic Infrastructure sector and accounted for 35.5 per cent of the resources channeled to the Social Infrastructure sector. The Directly Productive and Administrative sectors received 11.6 per cent and 5.2 per cent respectively in new ODA from bilateral sources.

The MTCs provided 9.5 per cent of new ODA for Social Infrastructure which was mainly directed to the Health sector.

Disbursements to new and ongoing projects increased by 88.4 per cent to US$504.5 million ($50.8 billion) compared with 2012. Loan and grant disbursements increased by 54.3 per cent and 175.9 per cent respectively (Table 2.2). MFIs accounted for 71.4 per cent of total disbursements amounting to US$358.2 ($36.1 billion). This was largely attributed to quick-disbursing loans for budget support programmes, reflecting a 195.5 per cent increase compared with 2012 (Figure 2E).

Disbursements from bilateral sources amounted to US$132.1 million ($13.3 billion), an increase of 6.2 per cent, compared with 2012. This was primarily due to an increase of US$121.6 million ($12.3 billion) in disbursements for economic infrastructure projects resulting from the resumption of activities under the JDIP. Disbursements from MTCs

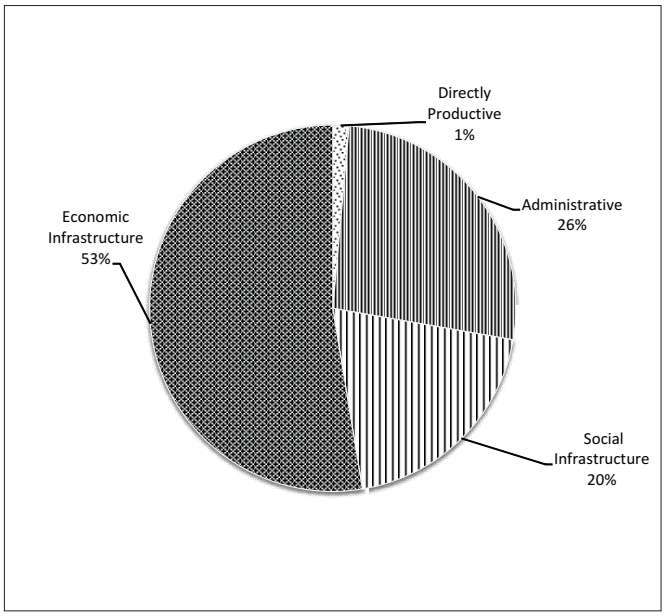

FIGURE 2D: DISTRIBUTION OF NEW OFFICIAL DEVELOPMENT ASSISTANCE 2013

totalled US$14.2 million ($ 1.4 billion), a 2.7 per cent decrease compared with 2012.

NET FLOWS

Net flows[12] between Jamaica and its three main multilateral lending partners (IDB, CDB and World Bank) was US$81.6 million ($8.2 billion) compared with US$-62.2 million ($-6.3 billion) in 2012 (Table 2.3). Disbursements totalled US$280.2 million ($28.2 billion), while total repayment of principal, interest and other charges decreased to US$198.6 million ($20.0 billion), which resulted in an increase of 231.2 per cent in net flows compared with 2012. The increase in the net flow position reflected higher disbursements from the IDB and World Bank through quick disbursing budget support loans.

Given the size of the loan portfolio with the PRC, inclusion of the flows between Jamaica and China increased total net flows to US$143.8 million ($14.5 billion) as indicated in Table 2.3.

MULTILATERAL FINANCIAL INSTITUTIONS

Caribbean Development Bank

The cooperation programme with the Caribbean Development Bank (CDB) consisted of 12 projects amounting to US$181.0 million ($18.2 billion). The portfolio comprised eight projects with loan financing totalling US$130.7 million ($13.2 billion), and four grants amounting to US$12.6 million ($1.3 billion). Counterpart contribution totalled US$37.7 million ($3.8 billion), representing US$35.4 million ($3.6 billion) for loan projects and US$2.3 million ($231.8 million) for grant funded projects. The sectoral distribution of the loan-financed projects was Social Infrastructure, US$65.8 million ($6.6 billion); Economic Infrastructure; US$55.9 million ($5.6 billion); Administrative US$1.2 million ($120.9 million); and Directly Productive US$7.8 million ($786.0 million). The sectoral distribution of the grant-funded projects was Social Infrastructure, US$11.7 million ($1.2 billion); Economic Infrastructure; US$0.7 million ($70.5 million); and Administrative US$175 000 million ($17.6 million). Disbursements totalled US$40.0 million ($4.0 billion) which was US$19.1 million ($1.9 billion) less compared with 2012, reflecting the age of the portfolio in which three loan projects ended. Loan disbursements amounted to US$38.6 million ($3.9 billion) and a total of US$1.4 million ($141.1 million) was disbursed for grant funded projects.

Two new projects totalling US$26.9 million ($2.7 billion) were approved as follows:

— The **Second Students Loan** for US$20.0 million ($2.0 billion) to provide resources to assist with

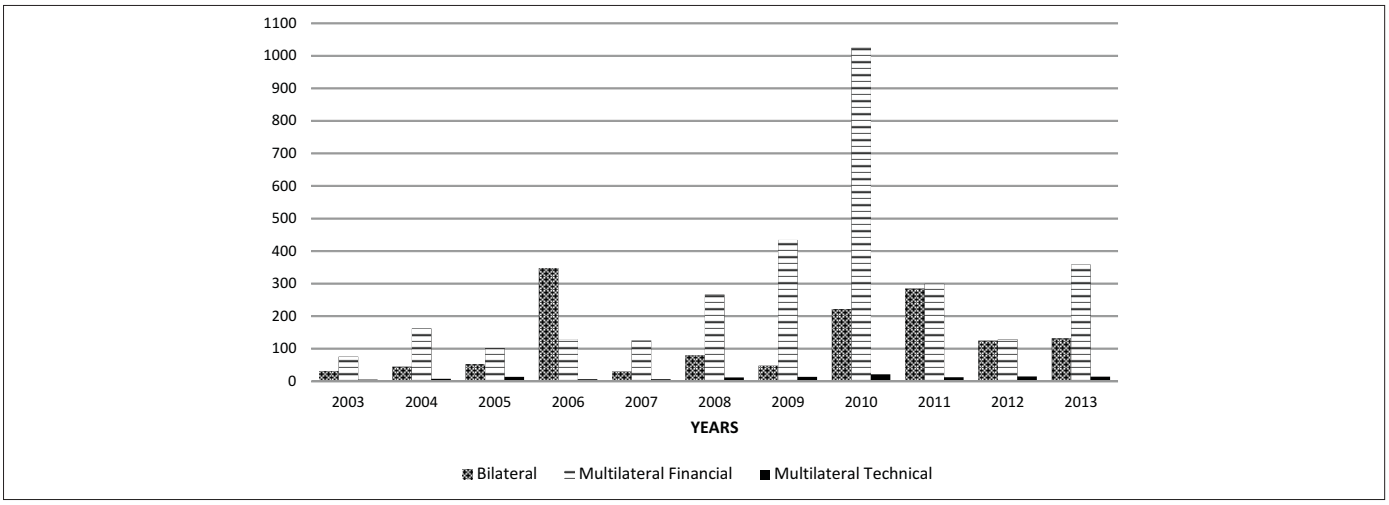

FIGURE 2E: ODA DISBURSEMENTS BY SOURCE, 2003 - 2013

12 Net Flows equals Total Disbursements less Total Repayments.

TABLE 2.3
NET FLOWS - 2013
(US$ MILLIONS)

	IDB	CDB	IBRD	TOTAL	CHINA	TOTAL with China
Loan Disbursements	101.9	21	157.3	280.2	85.7	365.9
DEBT SERVICING:						
Repayments (Principal)	98.7	17.9	37.1	153.7	9.3	163
Interest and Charges	23.1	11.8	10	44.9	14.2	59.1
Net Flow	-19.9	-8.7	110.2	81.6	62.2	143.8

Source: Planning Institute of Jamaica, International Development Partners and Ministry of Finance and Planning

funding of loans for tertiary level students through the Student Loan Scheme.

— The **Basic Needs Trust Fund 7** with US$6.9 million ($695.3 million) in grant resources aimed at reducing poverty and vulnerability through enhanced access to basic and social infrastructure, and human resource development services.

Three projects with loan financing totalling US$23.8 million ($2.4 billion) were completed:

— The **Agriculture Support Project (2009- 2013)** for US$7.8 million ($786.0 million) was aimed at supporting access to credit by small farmers in order to spur food production. A total of 508 loans were granted with 490 through the National People's Co-operative Bank and another 18 from other Approved Financial Institutions. The resources were primarily directed at livestock, ground provision, fishery, poultry, vegetables and greenhouses, coffee, fruits and horticulture

— The **Washington Boulevard Improvement – Fifth Road Project (2007-2013)** was supported by a loan of US$14.8 million ($1.5 billion). The project facilitated the reconstruction and widening of 2.75 kilometres of Washington Boulevard and Dunrobin Avenue between Molynes Road and Constant Spring Road in St. Andrew, which included the construction of three bridges. The project has resulted in the following: reduced traffic congestion along this particular corridor; mitigation of flooding during heavy rains ; improved safety of pedestrians with the installation of traffic signals and additional street lighting, as well as wider sidewalks

— The **Development Planning Framework for Jamaica (2006-2013)** with US$1.2 million ($120.9 million) supported the development of the Threshold 21 (T21) Jamaica Planning Model; completion and publication of *Vision 2030 Jamaica - National Development Plan* as well as the preparation of the Medium Term Socio-Economic Framework documents for the periods 2009-2012 and 2012-2015; and the establishment of the supporting framework for ongoing monitoring, evaluation and communication for the National Development Plan.

The CDB advised of an indicative amount of US$33.8 million ($3.4 billion) in concessionary loan funding to support a new Country Strategy Paper 2014–2016. Discussions on the new strategy commenced with a consultation session involving various Government of Jamaica stakeholders and Bank representatives.

European Union (EU)

The cooperation programme with the European Union[13] consisted of 17 programmes and projects totalling €220.1 million ($28.9 billion[14]). All programmes and projects are funded from the European Development Fund (EDF) with the exception of the Sugar Transformation Programme and Banana Programmes which are funded by the General Budget of the EU. The EU contribution amounted to €216.8 million ($28.5 billion) of grant resources and Government counterpart funding totalled €3.3 million ($433.2 million). The sectoral distribution of grant resources provided by the EU was Administrative, €151.4 million ($19.9 billion), Social Infrastructure, €50.2 million ($6.6 billion), and Directly Productive €15.2 million ($2.0 billion).

A total of €47.4 million ($6.2 billion) was disbursed which represented an increase of 251 per cent compared with 2012. This increase is attributed to the restoration of the country's budget support eligibility following the conclusion of the arrangement under the EFF with the IMF and Cabinet's approval of the Public Financial Management Reform Action Plan (PFM RAP). Of the total disbursed for budget support, 51.7 per cent was linked to the Government's Sugar Transformation Programme.

Four Financing Agreements and one rider were signed for a total of €38.6 million ($5.1 billion). Of the total amount, €11.9 million ($1.6 billion) were initially slated for budget support, but had to be diverted to projects during the period of budget support ineligibility[15]. The new agreements were:

— ***Programme for the Reduction of Maternal and Child Mortality*** (PROMAC) for €22.0 million ($2.9

13 In 2013, the European Union remained Jamaica's largest provider of grant resources.

14 Annual exchange rate: €1.00:$131.28.

15 Access to budget support is premised on three general eligibility conditions: a stability-oriented macroeconomic policy framework, progress in public financial management, and a credible overall/sector policy. Protracted delays in reaching an agreement with the IMF suggested that Jamaica was unable to prove its compliance with the first eligibility condition.

billion) – The overall objective of PROMAC is to provide support in attaining Millennium Development Goals 4 "Reducing Child Mortality" and 5 "Improving Maternal Health" through inter alia, the introduction of new critical care services via maternal and neonatal high dependency units in all four health regions. This will involve the provision of infrastructure, equipment, training and educational campaigns (see chapter on Health)

— ***Economic Partnership Agreement Capacity Building II project*** for €5.0 million ($656.4 million) – the overall objective of the Project is to support the Government in addressing the trade deficit, accelerating exports, enhancing competitiveness and integrating the economy into global markets. EPA II will expand the focus of the existing EPA Capacity Building Project to provide assistance to small and medium enterprises (SMEs).

— ***Public Financial Management Support Programme (PFMSP)*** [16] for €5.0 million ($656.4 million) – the overall objective of the reforms to be supported is to achieve more efficient public finance management, notably by: (i) strengthening of internal budget control and central cash management; (ii) modernisation of the public procurement process; and (iii) improving external budget audit & oversight.

— ***Banana Accompanying Measures*** for €4.7 million ($620.9 million) – the project is to combat poverty and improve revenues in the banana dependent areas by: (i) improving the productivity and resilience of small farmers; and (ii) strengthening the link between small farmers and markets.

— **A *rider to the Poverty Reduction Programme III* (PRP III)** for the amount of €1.9 million ($249.4 million), increasing the total amount of the PRP III to €11.9 million ($1.6 billion). The purpose of the PRP III is to contribute to growth and equitable development by promoting economic well-being and improving the quality of life for residents living in volatile and vulnerable communities.

The following projects came to an end:

— **EU Banana Support Programme (EU BSP)** – The EU BSP was implemented from 2000 to 2013 for which a total of €42.6 million ($5.6 billion) was provided through 10 financing agreements commencing in 2000. The main purpose of the EUBSP was to maintain living standards of farmers, farm and port workers in the six banana producing parishes of St. Mary, Portland, Clarendon, St. Thomas, St. Catherine and St. James. Some of the main achievements of the Programme included: rehabilitation of 57 km of parochial roads; establishment of the Catastrophe Fund to assist farmers in the event of a natural disaster; supply of 10 automated weather stations to the Meteorological Offices to collect weather data such as rainfall and humidity; and implementation of livelihood projects in traditional banana producing parishes, which included cocoa production, agro-tourism, beekeeping and training in data entry.

— **Tropical Storm Nicole Rehabilitation Programme** for €7.0 million ($919.0 million) – the overall objective was to contribute to the reduction of poverty and the minimisation of risk to the government's Economic Reform Process as a result of Tropical Storm Nicole that affected Jamaica from September 26–October 1, 2010. The full amount was disbursed as budget support in 2013. Although the grant agreement was signed in May 2012, the disbursement was delayed due to Jamaica's ineligibility for budget support.

— **Climate Change Adaptation & Disaster Risk Reduction Project** was implemented from October 2010–December 2013 for a total of €4.5 million ($590.8 million). The main objective of the project was to assist Jamaica in its adaptation to climate change by increasing the resilience of natural ecosystems and reduce the risks associated with natural hazards (see chapter on Sustainable Development).

— **Poverty Reduction Programme (PRP) II** (2007–2013) €13.6 million ($1.8 billion) –Building on PRP I, PRP II aimed to alleviate poverty through sustainable growth focusing on community safety and reducing criminal behaviour in volatile and vulnerable communities across the island. The main achievements under PRP II were: implementation of 31 socio-economic community projects at a cost of €7.8 million ($1.0 billion), which included the construction of classrooms, rehabilitation of roads, schools and community centres and the provision of equipment; the construction and equipping of the Lucea Family Court House; and the rehabilitation and equipping of seven police stations.

The EU provides grant resources to non-state organizations from its European Instrument for Democracy and Human Rights (EIDHR) through calls for proposals, which is managed solely by the European Commission. A total of €0.7million ($91.9 million) was disbursed to these organizations.

Inter-American Development Bank (IDB)

The cooperation programme with the IDB totalled US$589.7 million ($59.4 billion), representing a decrease of 11.0 per cent compared with 2012**.** The portfolio comprised 14 projects with loan resources and Government financing totalling US$559.8 million ($56.4 billion) and US$16.9 million ($1.7 million) respectively. Grant support for over 41 projects amounted to US$13.0 million ($1.3 billion). Jamaica also benefited from a pool of US$5.1 million ($513.9 million) in regional grant funding for three projects.

Sectoral allocations for the loan portfolio were as follows: Economic Infrastructure US$238.0 million ($24.0 billion); Administrative US$185.0 million ($18.6 billion); Social Infrastructure US$91.0 million ($9.2 billion); and Directly Productive US$31.8 million ($3.2 billion). Grant support was

16 The Public Financial Management Support Programme represents the grant portion of the overall Public Sector Efficiency Programme. Refer to Inter-American Development Bank section of this chapter.

focused in the following sectors: Economic Infrastructure US$6.0 million ($604.6 million); Administrative US$2.7 million ($272.1 million); Social Infrastructure US$4.1 million ($413 million).

Portfolio disbursements totalled US$104.3 million ($10.5 billion), an increase of 46.0 per cent compared with 2012. This was directly attributed to the Public Financial and Performance Management Programme with budget support financing of US$60.0 million ($6.0 billion), which was fully disbursed. Disbursements for loans and grants amounted to US$101.4 million ($10.2 billion) and US$2.9 million ($292.2 million), respectively.

The following three projects totalling US$57.8 million ($5.8 billion) were completed:

— **The National Irrigation Development Programme (2004-2013)** – disbursed US$11.8 million ($1.2 billion) of the original US$16.8 million ($1.7 billion) loan, with US$5.0 million ($503.9 million) being cancelled due to slow implementation. Achievements included the: construction of three irrigation systems (Yallahs, St. Thomas; New Forest/ Duff House, Clarendon; Colbeck, St. Catherine); establishment of Water Users Associations (WUA) and a WUA Support and Regulation Unit within the National Irrigation Commission (NIC); training of 28 farmers as lead facilitators in the farmer field school methodology; and establishment of 17 demonstration plots; and institutional strengthening of the NIC including a strategic business review.

— **Kingston Water and Sanitation Programme (2005–2013)** – loan financing of US$25.0 million ($2.5 billion) supported the improvement in reliability of potable water supply and sanitation services in Kingston and St. Andrew with the rehabilitation of the Hope River intake, Hope and Mona water treatment plants, and the Darling Street sewerage plant; and improvement in the quality of services offered by the National Water Commission through institutional strengthening.

— **Citizen Security and Justice Programme II (2009–2013)** – disbursed the entire US$21.0 million ($2.1 billion) in loan resources prior to the scheduled end of the programme. Institutional strengthening was provided for the Ministry of National Security as well as work continued in 50 communities on restorative justice, strengthening community based multi-service centres, skills training, and social marketing campaign (see chapter on National Security).

One new loan, in the amount of US$14.0 million ($1.4 billion) for the **Public Sector Efficiency Programme** was approved. The objective is to improve the efficiency of the Jamaican public sector by strengthening government capacity in Human Resource Management (HRM); Information and Communication Technologies Management (ICTM); and control systems and accountability mechanisms. Additional grant financing was provided by the European Union and the China Fund in the amounts of US$6.6 million ($665 million) and US$11.0 million ($1.1 billion), respectively. The Programme will be administered by the IDB.

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

The cooperation programme with the World Bank comprised eight loan projects amounting to US$844.7 million ($85.1 billion), reflecting an increase of 16.7 per cent compared with 2012. The total represented loan funding of US$270.3 million ($27.2 billion) and counterpart contribution of US$574.4 million ($57.9 billion). The unusually high level of counterpart financing in the portfolio is directly related to the US$493.9 million ($49.8 billion) funding for the Early Childhood Development Project which supported implementation of the National Strategic Plan for Early Childhood Development. The World Bank also administered seven grants with total financing of US$11.1 million ($1.1 billion), representing funding for four projects under the Japanese Trust Fund amounting to US$10.4 million ($1.0 billion) and three for the DFID Trust Fund for US$0.7 million ($70.5 million).

The sectoral distribution of the loan financing was Economic Infrastructure US$15.0 million ($1.5 billion); Directly Productive US$15.0 million ($1.5 billion); Administrative US$130.0 million ($13.1 billion); and Social Infrastructure US$110.3 million ($11.1 billion). Total disbursements under the portfolio was US$157.3 million ($15.9 billion), an increase of US$129.5 ($13.0 billion) compared with 2012. This increase is directly attributable to the approval and disbursement of US$130.0 million ($13.1 billion) for the **Economic Stabilization and Foundations for Growth Development Policy Loan** which is aimed at supporting the Government in building the foundations for growth and resilience.

Three projects amounting to US$84.3 million ($8.5 billion) were completed:

– The **Inner City Basic Services for the Poor Project (2009-2013)** with a loan of US$29.3 million ($3.0 billion) funded the upgrading of physical and social infrastructure as well as the provision of social services in 12 underserved communities (see chapter on Social Development, Social Protection and Culture).

– The **Early Childhood Development Project (2009-2013)** funded by a loan of US$15.0 million ($1.5 billion) facilitated:

– the development of screening tools for early childhood parenting education and support programmes and identification of children development delays for early intervention

– the granting of permits to over 50.0 per cent of early childhood institutions to operate having met the relevant health and safety standards required

– the development of the Child Health Health and Development Passport which is now utilized in all health facilities across the country for the screening of children from birth. Over 100 early childhood practitioners were also trained in the use of the Passport.

— The **Second HIV/AIDS Project (2008–2013)** with loan finance of US$40.0 million ($4.0 billion) supported the implementation of Jamaica's National

HIV/AIDS Programme through initiatives including:

- renovation of a new treatment site in Portland and upgrading of infrastructure and the provision of supplies and equipment for the National Public Health Lab and the Tuberculosis Laboratory
- development and dissemination of sectoral HIV/AIDS plans and policies to six line Ministries
- upgrading of the Biomedical Waste Management Plant in the Western Region. To improve sustainability, services are provided under a Service Level Agreement
- procurement of HIV testing supplies, alternative nutrition for new-borns to discourage breast-feeding amongst HIV-infected mothers as well as nutritional supplements to promote antiretroviral (ARV) medication adherence.

The Government and the World Bank participated in a consultation process to develop the new Country Partnership Strategy (CPS) to cover the period 2013–2017. The World Bank has committed US$510.0 million ($51.4 billion) to the CPS with the main focus being on growth. Approximately 50.0 per cent of these resources will be for budget support. A portion of the remaining resources will be allocated to new investment projects in several areas including: growth and competitiveness; public sector transformation; and youth employment in digital and technological industries. Continued support will also be provided to existing investment projects through the new modality of Additional Financing[17] to projects in the areas of early childhood development, integrated community development and social protection.

BILATERAL COOPERATION[18]

The **Federative Republic of Brazil** disbursed US$68 820.0 ($7.0 million) from grant assistance of US$ 4.4 million ($443.4 million) allocated to the project for the establishment of a Centre for Professional Training at the HEART Trust/NTA Portmore facility. Disbursements supported, inter alia, the procurement of equipment, accessories and tools.

Canada, through the DFATD**,** committed a total of C$67.4 million ($6.6 billion)[19] in grants to 24 projects. The bilateral portfolio, which comprised four bilateral projects, amounted to C$45.6 million ($4.5 billion), while Jamaica was granted C$21.8 million ($2.1 billion) of the regional programme. The Administrative sector, which was allocated C$33.6 million ($ 3.3 billion), continued to be the focus of assistance, specifically in the areas of justice reform and fiscal reform. Assistance to the Social Infrastructure and Directly Productive sectors was C$29.8 million ($2.9 billion) and C$4.0 million ($392.5 million), respectively. Disbursements to bilateral projects totalled C$1.8 million ($176.6 million), a decrease of C$1.4 million ($137.4 million) compared with 2012. Disbursements to national projects from regional programmes amounted to C$3.7 million ($363.1 million) an increase of C$1.0 million ($98.1 million) compared with the previous year.

Bilateral assistance totalling C$27.0 million ($2.6 billion) was approved for the following programmes:

- Citizen Security and Justice Programme (CSJP) Phase III, an amount of C$20.0 million ($2.0 billion). The project, co-financed with IDB and DFID, is a multifaceted crime and violence prevention intervention, which focuses on building community safety and security in volatile and vulnerable communities.
- Justice Undertakings for Social Transformation (JUST**)**, additional resources of C$2.0 million ($196.3 million) to the social component of the on-going programme.
- Public Financial Management, a sum of C$5.0 million ($490.7 million) for technical assistance to Government's Public Financial Management Reform Action Plan.

Jamaica is also expected to benefit from the Judicial Reform and Institutional Strengthening regional project which was approved in December. The project seeks, inter alia, to improve the administration of justice and to build the capacity of the Caribbean Court of Justice, National Supreme Courts, and Magistrate Courts across the Caribbean, to facilitate the deepening of economic integration.

The cooperation programme with the **People's Republic of China (PRC)[20],** totalled US$1.0 billion ($100.8 billion) for assistance to 16 projects. This comprised loan financing of US$ 842.2 million ($84.9 billion), counterpart resources of US$113.9 million ($11.5 billion) and grant assistance amounting to US$44.8 million ($4.5 billion). The PRC continued to focus its support on the Economic Infrastructure sector which accounted for US$ 788.4 million ($79.4 billion) of the resources provided, reflecting an increased allocation of resources to road infrastructure. Assistance to the Directly Productive and Social Infrastructure sectors was US$ 125.5 million ($ 12.6 billion) and US$ 87.0 million ($ 8.8 billion), respectively. Approximately US$ 94.3 million ($9.5 billion) was disbursed, an increase of US$ 2.0 million ($201.5 million) compared with 2012.

Agreements were signed for the following:

- a loan of US$300.0 million ($30.2 billion) for the Major Infrastructure Development Programme to finance the rehabilitation of roads and upgrade or reconstruct bridges throughout the island. Of the resources provided, US$50.0 million ($5.0 billion) will be allocated to the Jamaica Emergency Employment Programme (JEEP) for infrastructural projects such as construction of retaining walls and sidewalks

17 The Bank may provide additional financing to an ongoing, well-performing Project for completion of Project activities when there is a financing gap or cost overrun, for scaling up the development effectiveness of the Project, and/or in cases of Project restructuring, when the original financing is insufficient for the modified or additional activities.

18 This section reports on country to country assistance as well as assistance Jamaica receives under Caribbean Regional Programmes funded by various bilateral entities.

19 The annual average exchange rate of C$1: $98.13 is used.

20 In 2013 PRC was the largest provider of loan resources.

— a loan totalling US$11.0 million (US$1.1 billion) funded by China's Co-Financing (Trust) Fund for Latin America and the Caribbean, will be utilized for the PSEP[21]. Assistance will facilitate Government's efforts to modernize the business processes of the public sector to bring about greater efficiency. The project will be co-financed with the EU and the IDB

— a grant of 100.0 million Yuan[22] ($ 1.7 billion) for projects to be mutually agreed

— a grant in the amount of 500,000 Yuan ($8.3 million) to undertake a feasibility study for the construction of two Early Childhood Institutions in Kingston

— a grant of 500 000 Yuan ($8.3million) to support the design of an expanded Confucius Institute at The University of the West Indies, Mona.

The following initiatives ended:

— A line of credit to the Development Bank of Jamaica (2010-2013) for US$20.0 million ($2.0 billion) supported private direct investment in Agriculture, Tourism, Manufacturing and other sectors. Seventy per cent of the resources was disbursed to Tourism projects, 29.0 per cent to Agriculture (sugar) and 1.0 per cent to the Distributive Trade

— Support to the Ministry of Agriculture and Fisheries (MoAF) (2009–2013) was aimed at improving the productivity and production in the agricultural sector through training and the procurement of equipment. Equipment procured included: four tractors, two rice harvesters, four rice seedling machines, and three trucks. Staff members of the MoAF were trained in the use and maintenance of the equipment.

The Federal Republic of **Germany** provided grant assistance of US$0.8 million ($80.6 million), to support the project, *Designing and Communicating Low Carbon Energy Roadmaps for Small Island States of the Caribbean Project (2011-2013).* Achievements under the project, which ended in November, included: the development of a carbon impact monitoring tool, the preparation of a draft Low Carbon Road Map, and the development of a Sustainable Energy Roadmap for Jamaica.

The cooperation programme with the government of **Japan**, executed through the Japan International Cooperation Agency (JICA), amounted to US$11.8 million ($1.2 billion). This comprised grants and technical assistance totalling US$1.0 million ($100.7 million) and assistance of US10.8 million ($ 1.1 billion) provided through Trust Funds administered by the World Bank and the IDB. Sectoral allocation was as follows: Social Infrastructure**,** US$9.1 million ($917.0 million), and Economic Infrastructure US$2.7 million ($272.1 million). Disbursements for the portfolio totalled US$2.1 million ($211.6 million) of which US$1.6 million ($161.2 million) was from Trust Funds. Table 2.5 details the support provided under the Japanese Overseas Cooperation Volunteers Programme**.**

The following projects, supported by Trust Funds administered by the World Bank, ended:

— PATH Conditional Cash Transfer Programme (2010–2013) for US$2.5 million ($251.9 million) which provided grant support to improve the livelihoods of 10 000 poor and vulnerable elderly and disabled persons affected by the financial crisis

— Community Crime and Violence Prevention Project (2009–2013) with grant resources of US$ 2.7 million ($ 272.0 million) supported the country's efforts in reducing the incidence of crime and violence in high risk and vulnerable inner city communities.

Under the Grassroots Human Security Grant Programme, assistance was provided as follows:

— Annotto Bay Hospital Rehabilitation – resources of US$123 000 ($12.4 million) to rehabilitate the hospital's female ward

— Titchfield High School – the sum of US$99 777.0 ($10.1 million) for the rehabilitation of Block A of the main school, damaged during the passage of Hurricane Sandy in 2012

— Glengoffe High School – assistance of US$116 866.0 ($ 11.8 million) for the construction of three additional classrooms and repair to the roof of the canteen damaged by Hurricane Sandy

— Boundbrook Primary School – assistance of US$122 186.0 ($12.3 million) to construct three classrooms.

The cooperation programme with the government of the **Republic of South Korea** totalled US$4.7 million ($473.6 million) in grant assistance. This comprised project funding of US$2.1 million ($211.6 million) and an amount of US$2.4 million ($241.9 million) provided through a Trust Fund administered by the IDB. New assistance of US$250 000 ($25.2 million) was approved from the Trust Fund**,** to design an Integrated Operating Control Centre for city management in Montego Bay**.** The sectoral distribution was Economic Infrastructure, US$2.1 million ($ 211.6 million), Administrative, US$1.7 million ($171.3 million), Social Infrastructure US$ 0.7 ($70.5 million) and Directly Productive US$162 000.0 ($16.3 million). Disbursements for the portfolio totalled US$2.7 million ($272.1 million) of which US$0.6 million ($60.5 million) was from Trust Funds.

The government of the **Kingdom of Spain** provided grant assistance of US$406 598 ($41.0 million) for the establishment of the Centre of Excellence for Advanced Technology in Agriculture (2010–2013). The project supported, inter alia, the training of 33 persons from the region, including Jamaica, in greenhouse technology: the construction of two greenhouses; and the construction of a pond for rain water harvesting. .

The cooperation programme with the **United Kingdom** comprised grants to nine bilateral projects totalling £24.6 million ($ 3.9 billion)[23], a total of £0.7 million ($110.8 million) through Trust Funds as well as eight regional projects from

21 Refer to IDB section.
22 The annual average exchange rate of Yuan1: $16.6 is used
23 The annual average exchange rate of £1:$158.30 is used.

which Jamaica will benefit. The sectors supported were Social Infrastructure, £7.4 million ($1.2 billion); and Administrative, £17.0 million ($2.7 billion). A total of £ 5.9 million ($934.0 million) were disbursed, an increase of £ 2.9 million ($ 459.1 million) compared with 2012. In addition, a sum of £ 2.0 million ($316.6 million) was approved to provide technical assistance to Government's Public Financial Management Reform Action Plan.

The following initiatives ended:

— Rose Town Foundation for the Built Environment project (2011–2013) for £30 000 ($4.7 million) which assisted selected households to formalize their tenure on lands they currently occupy. The initiative supported the acquisition of land titles by over 80 residents

— National Crime Victimization Survey (2012–2013) with resources of £120 000 ($19.0 million) measured the extent of the Jamaican public's exposure to crime, as reported by victims. The survey compared results from 2006, 2009 and 2012 surveys and revealed positive trends including a decline in self-reported victimization and criminal behaviour, as well as a decline in reports of community level crime problems and the frequency of witnessing violent incidents

— Citizen Security and Justice Programme Phase II (2009-2013) with an amount of £7.25 million ($1.1 billion) was co-financed with the IDB. (See section on IDB)

— The Strategic Flexible Funding Facility (2009–2013) with financing of £0.5 million ($ 79.2 million) was administered by the UNDP. The project was aimed at increasing Government's capacity to respond to strategic short-term development needs in keeping with its economic growth policy, as well as the conditionalities of the various loan programmes. Funded was provided for inter alia:

  – Preparation a Tax Expenditure Study

  – Preparation of Drafting Instructions for Fiscal Responsibility Framework

  – A Growth Inducement Strategy

  – Drafting of the Financial Stability Act

  – Establishment of a Comprehensive OMNIBUS Tax Incentive Regime

  – Creation and Development of the Insolvency Act and Regulations

  – OMNIBUS Banking Legislation

  – Providing recommendations for the establishment of a Tax Incentive Regime.

Assistance from the **United States of America**, executed through the United States Agency for International Development (USAID), consisted of grants to 14 projects in the amount of US$59.2 million ($6.0 billion). The sectoral distribution was as follows: Directly Productive, US$ 10.9 million ($1.1 billion); Administrative, US$11.1 million ($1.1 billion); and Social Infrastructure, US$37.2 million ($ 3.7 billion). Disbursements totalled US$15.2million ($1.5 billion) a decrease of US$500 000 ($50.4 million) compared with 2012.

The following new grant projects were approved:

— ***Partnership for Improved Reading Outcomes*** for US$3.0 million ($302.3 million) which supports the Ministry of Education's National Comprehensive Literacy Programme and is aimed at optimizing education sector inputs by consolidating all literacy interventions. The project is being implemented in 450 low-performing primary and all age schools, including the 172 primary schools, which were funded under the USAID/Jamaica Basic Education Project, ended in August

— **The Enrichment Initiative** with resources of US$2.0 million ($201.5 million) is being implemented in 195 schools. The assistance twins Information and Communication Technology and more individualized instruction for students in Grades one through Grade three who are having difficulties achieving their grade level in reading.

— Community Empowerment and Transformation (COMET) Phase II for US$12.7 million ($1.3 billion) is aimed at improving community safety. Project elements include: improving community policing practices; strengthening community and civil society organizations; strengthening juvenile justice and at-risk youth programmes; and reducing communities' vulnerability to climate change and natural disasters.

— ***Enhancing Capacity for Low Emission Development Strategies*** (EC-LEDS) for US$1.0 million ($100.8 million) will support GOJ's development of its climate change policy and plans including a Climate Change Policy Framework and a National Adaptation Plan.

— ***Respect and Tolerance*** with resources of US$120 000 ($12.1 million) is aimed at building respect and social tolerance for diversity through public awareness initiatives and student engagement activities at the University of Technology.

The following projects ended:

— ***The Jamaica Basic Education Project*** (2010–2013) with financing of US$8.3 million ($ 836.4 million) supported MOE's Education Transformation Programme and provided technical assistance aimed at improving literacy at Grades 1–3 in 172 primary schools. Achievements included the development of reading assessment instruments to evaluate reading skills; the development of an early reading assessment checklist to monitor the students reading progress; increased access to educational resources; the strengthening and establishment of Parent Teachers Associations in 60 participating schools; and enhancing the capacity of the MOE and the Jamaica Teaching Council to monitor school management (see chapter on Education and Training).

— ***Tropical Storm Nicole Rehabilitation*** (2011–2013) in the amount of US$250 000 million ($ 25.2 million) rehabilitated three secondary

TABLE 2.4
PERSONNEL ASSIGNED TO JAMAICA BY ORGANIZATIONS AND FOCAL AREAS, 2013

Country	Organization/Programme	No. of Personnel	Focal Areas
Canada	CUSO[a]	18	Marketing and PR; Community Mobilization; Youth Development; ICT; Statistical Research
	Medical Programme	134	Nursing, Pharmacy
		29	Medicine - Nephrology , Neonatology, Ophthalmology, Pathology And Primary Care Ophthalmology
		3	Dentistry
Japan	Japanese Overseas Cooperation Volunteers Programme	18	Education, Environment, Transport and Works; Disaster Mitigation
United States	Peace Corps	38	Education, Green Initiative, Youth, Health
Total		**240**	

a - CUSO is the former Canadian University Services Overseas

Source: Bilateral Partners and the Ministry of Health

schools—Browns Town, Port Antonio and Maggoty—damaged by the tropical storm.

— ***Community Empowerment and Transformation (COMET) Phase I*** (2006–2013) with funding of US$11.4 million ($1.2 billion) addressed good governance issues to reduce crime and violence. Achievements included: the delivery of an ethics and integrity programme for the Jamaica Constabulary Force (JCF); a case management course for the Independent Commission of Investigation; best practices seminars on Anti-corruption and Community-based Policing; and the revision of the JCF Community Policing Manual (see chapter on National Security and Justice).

— ***Support to Metcalfe Street Juvenile Centre (2011–2013)*** with resources of US$350 000 ($35.3 million). The project which was implemented by the UNDP provided funding for life skills training, medical health screening and treatment, and educational and recreational programmes towards the objective of contributing to the rehabilitation and reintegration of wards.

— ***The Youth Employment through Sustainable Livelihoods/Rural Youth Employment (RUYE) (2010 - 2013)*** for US$1.3 million ($131.0 million) was implemented by the UNDP. The project was aimed at contributing to the reduction of rural youth unemployment by increasing the ability of the youths to access sustainable livelihood options through the provision of skills training and increased access to post harvest production facilities. Twelve projects were established in agro processing, goat rearing, crop production and greenhouse farming, and approximately 200 persons, mainly youth, were trained in associated skills such as entrepreneurship, crop cultivation, goat rearing and marketing.

The **Bolivarian Republic of Venezuela** committed grant resources of US$2.0 million ($ 201.5 million) to the Small Farmers Input Supply Project (2010–2013). Through the various production marketing organisations 24 000 small farmers islandwide were trained in areas such as record keeping, land preparation, use of chemicals and plant protection. The project also distributed agricultural inputs (seeds, fertilizers and small tools); animal feed; livestock animals; and purchased farm machinery and equipment.

Under the grant component of Venezuela's Petrocaribe Energy Cooperation Agreement[24] resources totalling US$4.1 million ($413.2 million) were approved for assistance to several sectors including security, health, disaster preparedness, community development and sports.

Assignment of Overseas Personnel

Jamaica continued to benefit from the assignment of overseas personnel to aid in the alleviation of skilled manpower shortage, provision of technical know-how and hands-on assistance and transference of skills. The main areas that received assistance were health, education, environment and disaster mitigation (Table 2.4).

MULTILATERAL TECHNICAL COOPERATION

The **Commonwealth Fund for Technical Cooperation (CFTC)** provided support to the Government of Jamaica valued at approximately £100 000 ($15.8 million) primarily for the Administrative Sector.

Two new projects were approved:

Legal Drafting Services for the Office of the Chief Parliamentary Counsel* and *Legal Drafting Services for the Tax Administration Department to accelerate the preparation of tax legislation required as a conditionality under the loan programme with the IMF.

The study to investigate *Positioning Jamaica as a Bunkering (ship fueling) Location* (2012–2013) ended. It

24 The Agreement which was signed in 2006, allows Jamaica to defer payments to Venezuela for oil imports with concessional terms for repayment. The deferred amount is lodged in a Fund and the resources invested. After repayments to Venezuela and management costs are deducted, the surplus resources are used for grants for socio-economic development.

TABLE 2.5
NEW PROJECT AGREEMENTS SIGNED AND INITIATED WITH GEF

Approved/Initiated Projects	Amount (US$)	Amount (J$) Million
Advancing Food Security by creating alternate livelihood with use of energy efficient technology in the rural community of Mafoota	50 000	5
Preservation of Endemic Plant Species through the Promotion of Cacoon Castle Herbs and Spices Products	5 000	0.5
Conserving Biodiversity while Generating Sustainable Livelihoods through Sawyers Reforestation Project	5 000	0.5
Colouden Brae Head Water Harvesting Project	45 000	4.5
Combating Climate Change through Ecosystems Management and the use of Renewable Energy Technology	25 000	2.5
Application of Flooding Mitigation Measures & Forestry Conservation in the Bigwoods Community	30 000	3
Utilisation of Natural Resources through the Design and Construction of Eco Friendly Bamboo Buildings	50 000	3
Promoting the use of Renewable Energy through the Princess Field Solar Training and Cyber Centre	50 000	5
Promoting Mangrove Ecosystem Health and Fisheries Diversity in the Orange Bay Fish Sanctuary	50 000	5
Managing Natural Resources while Ensuring Sustainable Livelihoods in the Cockpit Country	50 000	5

Source: Ministry of Health

provided the government with a short-, medium- and long-term programme of work and recommendations to guide the administrative as well as the investment activities to be implemented if the proposed facilities are to be established according to international standards.

The **Food and Agriculture Organization (FAO)** project portfolio comprised six national projects totalling US$1.1 million ($109.2 million) and five regional initiatives.

Three new projects were approved and initiated during the year:

— ***Rapid Assessment and Formulation of five-year Strategic Plan For the Jamaica Dairy Industry*** – US$70 902 ($7.1 million)

— ***Emergency Food Security and Rural Livelihood Recovery for the Most Vulnerable farmers affected by Hurricane Sandy in Jamaica*** – US$300 000 ($30.2 million).

— ***Reduction of Post Harvest Losses along the Food Chain in the CARICOM Sub-region*- US$280 000 ($28.2 million).**

The following projects ended:

— ***Assistance to Manage Citrus Greening in Jamaica* (2011 – 2013)** US$412 994 ($41.6 million), provided agricultural technical officers with increased capacity to detect and diagnose citrus diseases, and improve the capacity of the MOAF to provide clean planting material for farmers.

— ***Strengthening Community Preparedness and Resilience to Natural Disasters in Selected Vulnerable Areas*** (2011–2013). Jamaica received US$444 000 ($44.7 million) to establish community-based Agriculture Disaster Risk Management Plans in five communities (Halls Delight, St Andrew; Cascade, Portland; Old Harbour Bay, St. Catherine; Rocky Point, Clarendon; New Market, St. Elizabeth), prepositioned emergency stocks in four of the communities and improved the capacity of the community emergency centres in three.

— ***School Gardens in Keith Primary and Bustamante High*** (2012–2013) – provided with poultry and slaughter facilities at a cost of US$20 944 ($2.1 million).

The **Global Environment Facility (GEF) Small Grants Programme** portfolio comprised 20 projects with donor funding of US$540 000 ($54.4 million). Of this amount US$360 000 ($36.3 million) was allocated to 10 new projects and US$181 000 ($18.1 million) was disbursed. These resources were matched equally by beneficiary cash and in-kind contributions at a one-to-one ratio and provided support to 20 Non-Governmental Organizations (NGO) and Community-Based Organizations (CBOs) in the areas of natural resource conservation, sustainable use of biodiversity, mitigation and adaptation to climate change, and prevention of land degradation. Table 2.5 shows the 10 new project agreements which were signed and initiated.

Five projects came to an end:

— ***Community Tourism in Ocho Rios*** (2010–2013) US$40 000.00 ($4.0 million) – five hectares of degraded land were restored and a recreational area developed with a nature trail and log cabins

— ***University of Technology Plant extract repos*itory** (2010–2013) US$39 238 ($4.0 million) – initiation of a graduate programme in botany for the analysis of endemic plants to determine their medicinal and nutraceutical value

— ***Jeffrey Town Land Environment project* (2011-2013)** US$49 820 ($5.0 million) – gabion wall constructed, reforestation of 15 acres of land, installation of solar energy facilities in the community office building and installation of solar powered street lights.

— ***Capacity building for NGOs* –** (2011–2013) US$65 000 ($6.6 million) training in project writing and environmental education provided for rrepresentatives of NGOs and CBOs.

— ***Clarendon Parish Development Committee Rain Water Harvesting*** project (2011–2013) US$50 000.00 ($5.0 million) – water catchment tank restored and solar pumping introduced to facilitate domestic and irrigation usage.

The programme portfolio of the **International Atomic Energy Agency (IAEA)** comprised three national projects

with a budget for the year totalling €142 670 ($18.7 million). The allocation was expended and an additional sum of €107 591 ($14.1 million) granted to ensure the achievement of the expected outcomes. Jamaica also participated in 29 regional initiatives and secured benefits valued at €164 576 ($21.6 million) bringing total disbursements to €414 837($54.5 million).

The following projects ended:

— ***Developing National Capacities for the Application of Nuclear Science* (2009 – 2013)** – US$122 000 ($12.3 million) – facilitated the introduction of nuclear sciences as an academic option in The University of the West Indies (UWI), Mona and to date over 40 students have graduated from the undergraduate programme. Equipment and training were also provided for the establishment of a Radioecology Laboratory in the Physics Department.

— ***Programme of Action for Cancer Therapy (PACT) Assessment* (2013)** – provided an evaluation of the national cancer burden and the public health facilities which provide cancer care (see chapter on Health).

The **Organization of American States** disbursed US$273 351 ($27.5 million) to cover the cost of projects to finance Jamaica's participation in international conferences.

The **Pan American Health Organization** allocated a total of US$878 865 ($88.6million) for its three programmes, and disbursed 84.0 per cent as indicated below:

— Strengthening Governance and Health Systems within the Framework of Renewed Primary Health Care Approach – US$311 432 ($31.4 million)

— Disease Prevention and Control – US$247 683 ($25.0 million)

— Sustainable Development and Environmental Health and Protection – US$179 571($18.1 million)

The following projects ended

— National Plan for the prevention of blindness and visual impairment.

— Health policies and financing schemes to reduce the financial risks associated with diseases

— National Plan for the Elimination of Mother to Child transmission of HIV and congenital syphilis.

— National Non-Communicable Diseases Strategic Plan 2013 – 2017

— National Cancer Registry

— Integration of the National Family Planning Board and the National HIV programme into Single Authority for Sexual and Reproductive Health

The cooperation programme with the **United Nations Educational, Scientific and Cultural Organization (UNESCO)**, focused on the organization's core areas of Communication and Information, Education, Culture and Science. From the regional allocation, Jamaica benefited from disbursements of US$497 700 ($50.2 million) for capacity building initiatives in the social infrastructure sector. The education programme which utilized 48.0 per cent of the resources, contributed *inter alia*, to the strengthening of institutional capacities in Technical Vocational Educational Training (TVET), the institutionalization of ICT in Education, and improvements in the Education Ministry's response to HIV and AIDs. The Jamaica National Heritage Trust benefitted from the culture programme while several NGOs were recipients of support under the Communication and Information programme.

UNAIDS continued its support of the Government's efforts to reduce the prevalence of HIV/AIDS and to establish a legal and policy framework for HIV/AIDS prevention programmes amenable to the needs of victims. A major contribution was the support of the study of the Financial Sustainability of the HIV/AIDS programme as a basis for the development of an investment plan which should ensure adequate provision for the prevention and treatment of the disease.

The **United Nations' Children's Fund (UNICEF)** allocated US$1.6 million ($161.2 million) to support projects in the area of social infrastructure. A total of US$0.9 million ($91.0 million) was disbursed representing a decrease of 44.0 per cent in expenditure compared with the previous year. The decrease was partly attributable to the slow pace of development of projects for the new country programme, 2012–2016. Projects were implemented under three components, Adolescent Health and Empowerment, Quality Education, and Child Protection.

Five new projects were initiated:

– Reducing the Juvenile Population in State-supported Institutions in Jamaica: €360 338 ($49.8 million) for the support of three components of the Programme:

– The Child Development Agency (CDA) commenced the review of the Committee on the Rights of the Child, Convention on the Rights of the Child (CRC) – Based Child Care and Protection Act (2004) and the Children (Adoption of) Act (1958) through islandwide consultations, elite interviews and focus group discussions with stakeholders including children

– Stakeholder consultations were held to solicit inputs into the development of the draft National Child Diversion Policy that will result in fewer children in conflict with the law being incarcerated (see Social Development, Social Protection and Culture Chapter for details).

– The Mobile Mental Health Services Project /the Smiles Mobile under the Reducing the Juvenile Population in State-supported Institutions Project. This project provides for the assessment and treatment of children in residential child care and juvenile correctional centres, particularly those with extreme behavioural and psychological problems. Piloting was scheduled for July 2013–December 2014 in the South East Region of the island (Kingston, St. Andrew and St. Catherine) (see chapter on Health for details) .

– Community action to prevent alcohol tobacco and marijuana–related harm and risky sexual behaviours among underage youth in Jamaica US$46 000 ($4.6million) for adolescents and young persons ages 13–15. The project aims to improve the knowledge and skills of the target population in 20

rural and urban communities, regarding HIV/STI and pregnancy prevention, and assess the effect of underage drinking on risky sexual behaviour and perception. The baseline research being undertaken will inform the design, implementation and monitoring of future interventions among adolescents (see chapter on Health for details).

— Empowerment of Parents in Effective Discipline US$40 000 ($4.0 million) for improvement of parenting practices is intended to equip 120 facilitators in four sub-regions of Jamaica to train parents in measures to reduce/eliminate the use of corporal punishment and harsh parental words and substitute more effective positive disciplinary strategies.

— Autopsy on Suicide Behaviours US$22 000 ($2.2 million) involved conducting of research to ascertain the rate and prevalence of suicides and the characteristics of youth who have committed suicide, in order to develop effective and sustainable suicide prevention programmes among youth.

— Talk up Youth Tour US$270 000 ($27.2 million), an islandwide tour of the media programme "Talk up Yout" in which over 3 000 adolescents shared their views and proposed solutions to challenges faced in areas such as health, education and sexual and reproductive health. Over 20 duty bearers from the Ministries of Health, Youth, and Education participated in a planning exercise to address some of the matters raised.

Some of the projects completed were:

— Child Rights Education for professionals in child protection services (2012–2013) US$14 000 ($1.4 million). The project provided for training of relevant personnel with the aim of improving community relations, officers' ability to support child's rights, and relations between stakeholders. Achievements included the equipping of 222 security personnel with knowledge and tools to protect and promote the rights of children who come into contact or conflict with the law.

— Evaluation of the status and impact of maternal, paternal, newborn and infant health and development in the early years 2011–2013, training was conducted for 12 hospitals to increase their friendliness and strengthen the capacities to support maternal and child health.

— Support of US$14 700 ($1.48 million) to the finalisation of the Online E-Dashboard of National Indicators and targets for *Vision 2030 Jamaica - National Development Plan* – 2012–2013. See section in the Overview on *Vision 2030 Jamaica – National Development Plan.*

— Quality Rehabilitation and Reintegration – (2011–2013) to bring the practices of child protection professionals into conformity with the convention on the rights of the Child (CRC) and promote quality rehabilitation and reintegration into the education system. The Office of the Children's Advocate established Child Justice Guidelines for legal, medical and other professionals who deal with children who come into contact or are in conflict with the law.

— Improvement of Child Abuse Reporting—US$29 668 ($3.0 million) was aimed at assisting the Chil-

TABLE 2.6.
SCHOLARSHIPS AWARDED THROUGH ODA (US$)

COUNTRY	DISCIPLINE	PhD	MBBS	LLM (Law)	Masters	Bachelors	Short Course	Value of Award	No. Males	No. Females
Australia	Public Policy, Applied Science, Plant Health and Bio Security, Business Economics & Education	3			3			**982 263**	2	4
China	Medicine, Applied Chemistry, Enterprise Management, Business Administration, Urban Planning, Public Policy and Rural Environment	3	1		1	2	111	1 780 426	50	68
Cuba	Medicine		4					216 000	2	2
Japan	Crime Prevention, Sustainable Tourism, Young Leaders, SME Development, Disaster Risk Management, Urban Road Management, Industrial Wastwater Treatment & Energy						19	247 000	12	7
Russia	Medicine		5					294 250	2	3
Serbia	Medicine. Business Management, Economics		1		1	2		58 600	1	3
Sub-Total								3 578 539		
MTC										
Common-wealth Fund for Technical Cooperation	Tax Law , Spatial Planning, Food Safety, Hygiene, Earthquake Engineering, Empirical Economics and Finance	1		1	4			339 092	3	3
Organization of American States	Education, Policy	2						69 502		2
Sub-Total								408 594		
TOTAL		**9**	**11**	**1**	**9**	**4**	**130**	**3 987 133**	**72**	**92**

Source: Planning Institute of Jamaica, Bilateral Partners, Multilateral Technical Cooperation Agencies, the Ministry of Finance and the Ministry of Foreign Affairs and Foreign Trade

dren's Registry to develop a communication strategy to increase reporting of child abuse (see chapter on Social Development, Social Protection and Culture).

The United Nations Development Programme (UNDP) supported 11 projects in the Administrative, Social Infrastructure, and Directly Productive sectors with a disbursement of US$2.9 million ($292.2 million). Projects were implemented under the themes, Poverty Reduction, Environment and Energy and Governance.

One new project, **Hurricane Sandy Recovery** was initiated and completed in 2013 at a cost of US$100 000 ($10.8 million). The project which was a response to the need for coordinated and evidence-based recovery actions in areas that had suffered significant damage was implemented in four parishes, St. Thomas, Portland, St. Mary and St. Catherine. The following were achieved: recommendations for updating the national recovery framework to guide the range of recovery initiatives; development of recovery strategies and plans; sectoral analysis and collection of geospatial and qualitative data to facilitate hazard mapping and risk analysis; the restoration of livelihoods, and development of climate change adaptation in the target areas (see chapter on Sustainable Development for details).

Five other projects were concluded:

— **Enhancing Civil Society Participation in Local Governance for Community Safety or Parish Safety and Security Project (PSSC**) (2011– 2013) US$255 000 ($25.7 million) was aimed at building the capacity of local authorities and civil society organisations to address the problem of crime and violence and its developmental impacts. The project involved the development of tools to facilitate local level coordination. PSSCS were established in 12 parishes and their capacity built to undertake community safety audits, develop related plans and to take required actions in response to safety and security issues.

— **Mainstreaming Migration in National Development Strategies (**2012–2013) US$155 000 ($15.6 million) aimed at contributing to national socio-economic development by assisting Jamaica to comprehensively address the inter-linkages between migration and development. The project accomplished the Development of A National Policy and Plan of Action on International Migration and Development for Jamaica; an Extended Migration Profile along with a Plan of Action and protocols for Mainstreaming Migration into National Development Strategies (see chapter on Population for details).

— **Rural Youth Employment** (**RUYE)** 2010–2013 (see section under Bilateral Cooperation for details).

— **Support to Metcalfe Street** 2011–2013 (see section under Bilateral Cooperation for details).

— **The Strategic Flexible Funding Facility** 2009–2013 (see section under Bilateral Cooperation for details).

The United Nations Population Fund (UNFPA) contributed US$139 056 ($14.0 million) to support activities related to adolescent development; prevention of HIV/AIDS; sexual and reproductive health, population and development, and prevention of gender-based violence. Highlights of the programme were collaboration with the Ministry of Education in reprinting the Home and Family Life Education curriculum for schools; supporting of the Sexual and Reproductive Health Authority in the sensitisation of key stakeholders regarding the role and functions of the organisation; and support of the policy for the reintegration of adolescent mothers into the formal school system. The allocation represents a 50.0 per cent decrease from the previous year's contribution.

UN Women disbursed US$247 200 ($25.0 million) in 2013 in support of 8 projects in the Social Infrastructure sector. Focus was placed on the development of the National Strategic Action Plan for the elimination of Gender-Based Violence; developing the policy and legal framework for the improvement of the work standards of domestic workers; promotion of gender mainstreaming in government and private sector; and the overall empowerment of women to facilitate their increased contribution to the political, social and economic development of the country.

Two new projects were initiated:

— Supporting the Office of the Prime Minister in revising the draft National Strategic Action Plan to eliminate Gender Based Violence US$27 000 ($2.7 million)

— PowHERHouse! Harnessing the power of media for women's political empowerment US$200 000 ($20.2 million)

Two projects ended:

— Quotas for Women's Transformational Leadership and Participation in Jamaica (2011–2013) US$70 748 (7.1 million)

— Capacity Development in Budget analysis for Women's Organisations in Jamaica – (2012–2013) US$$25 000 ($2.5 million).

The **Global Fund for HIV Aids to Fight AIDS, Tuberculosis and Malaria** had an allocation of US$6.7 million ($679.8 million) for the HIV/AIDS Management Prevention and Control Programme in Jamaica. The total allocation was disbursed, in addition to US$160 000 ($6.0 million) to ensure a wider coverage of persons living with advanced HIV receiving antiretroviral drugs, and to deepen the national HIV AIDS prevention initiatives.

Scholarships

MTCs and Bilateral Partners supported 164 Jamaicans – 92 females and 72 males with scholarships totalling US$4.0 million ($403.1 million) to pursue studies in a variety of disciplines (see Table 2.6). Short term courses accounted for 50.8 per cent of the total scholarships with the PRC providing 87.8 per cent of these courses.

OUTLOOK

Economic growth and social well-being will be the dominant themes of the cooperation programme with Jamaica's International Development Partners in the near term. Areas of focus of the projects which are being developed for funding by IDPs include: competitiveness, fiscal management, public sector reform, human capital formation, improvements in the built and natural environment and citizen security and justice.

With the reengagement of the IMF and the 4-6 year commitments received from the MFIs, increased flow in the form of budget support, loans and grants is anticipated. Several projects within the World Bank's Country Strategy (2014-2017) will commence implementation with the broad objective of building the conditions for sustained and inclusive growth**.** The CDB Country Strategy (2014–2016) will be elaborated, with the proposed strategic objective also being inclusive growth and sustainable development. The EU 11th EDF Multiannual Indicative Programme (2014–2020) which is focused on environment, justice and public financial management, is expected to be finalised and approved. Work will also begin on a new Country Strategy to guide the IDB cooperation programme. The portfolio of bilateral assistance will be concentrated in the areas of economic and social infrastructure, notably with the commencement of activities under the Major Infrastructure Development Programme and the Citizens' Security and Justice Programme. Bilateral assistance is also anticipated for public financial management. The UN agencies will assist in the development of a Millennium Development Goals acceleration framework that will guide the GOJ's action towards meeting the goals that are lagging in achieving the 2015 targets. These agencies are also expected to provide support to the GOJ on the Post-2015 consultations. The Aid Strategy supported by the UNDP, focusing on aid effectiveness should be finalized during the upcoming year.

Opportunities for cooperation with non-traditional partners will continue to be pursued in areas such as management of children's issues, macro-economic development and public sector reform. Finally, a project to improve the public investment management system is to be scaled up with enhancements to the procedures governing the identification, appraisal and approval of investment projects. ■

CHAPTER 3

SUSTAINABLE DEVELOPMENT

INTRODUCTION

National priority actions for sustainable development[1] (SD) continued to be aligned to the strategic priorities of *Vision 2030 Jamaica – National Development Plan* as outlined in the Medium Term Socio-Economic Policy Framework, 2012-2015. These actions were primarily geared towards increasing the resilience of the natural environment, climate change adaptation, institutional capacity building, development planning, and geospatial data management. These actions included:

- establishment of the Climate Change Division within the Ministry of Water, Land, Environment and Climate Change (MWLECC) to coordinate national climate change activities
- successful completion of two climate change related programmes—the GOJ/EU/UNEP[2] Climate Change Adaptation and Disaster Risk Reduction Programme (CCADRRP) which facilitated reforestation, coastal restoration, policy development and sustainable alternative livelihoods— and Phase I of the Pilot Programme for Climate Resilience (PPCR) which, among other things, expanded the hydro-meteorological network
- approval of the Climate Change Policy Framework and Action Plan by Cabinet and its tabling in Parliament as a Green Paper to guide the country's adaptation and mitigation agenda and to reduce the risks posed by climate change to all sectors and geographic regions
- assessment of forest cover change through change detection analysis using Geographic Information Systems (GIS) technology in the South-Negril Orange River Watershed
- promulgation of four Provisional Development Orders by the Town and Country Planning Authority to guide orderly development in specific areas.

GLOBAL REVIEW OF SUSTAINABLE DEVELOPMENT

Climate Change

Global efforts to address climate change continued, primarily under the United Nations Framework Convention on Climate Change (UNFCCC). The 19th Conference of the Parties (COP 19) was held in Warsaw, to, among other things, further agreements on emissions reductions and to promote adaptation. The main outcomes of the meeting included:

- approval of the Warsaw Framework for REDD+ [3] which provides a formal framework, safeguards and funding towards cutting deforestation by half by 2020 and halting it by 2030. The framework is backed by initial pledges of US$280.0 million and will become effective in 2015
- adoption of the general guidelines for domestic measurement, reporting and verification of domestically supported nationally appropriate mitigation actions by developing country Parties
- approval of the operational arrangements of the Green Climate Fund (GCF) thereby laying the basis for resource mobilisation and effective operationalization by December 2014
- adoption of the Warsaw International Mechanism for Loss and Damage associated with climate change. The mechanism seeks to build the technological, financial and knowledge capacities of developing countries to tackle climate-related loss and damage impacts
- opening of the Climate Technology Centre and Network (CTCN), a technology transfer mechanism responsible for stimulating technology cooperation and transfer to developing countries. The CTCN will facilitate development and implementation of clean energy technology projects.

1 Whilst SD encompasses economic, social and environmental dimensions, this chapter focuses mainly on environmental and governance aspects. Economic and social issues are addressed in other chapters.

2 United Nations Environment Programme

3 Reducing Emissions from Deforestation and Forest Degradation (REDD) is an effort to create a financial value for the carbon stored in forests, offering incentives for developing countries to reduce emissions from forested lands and invest in low-carbon paths to sustainable development. "REDD+" goes beyond deforestation and forest degradation, and includes the role of conservation, sustainable management of forests and enhancement of forest carbon stocks - http://www.un-redd.org

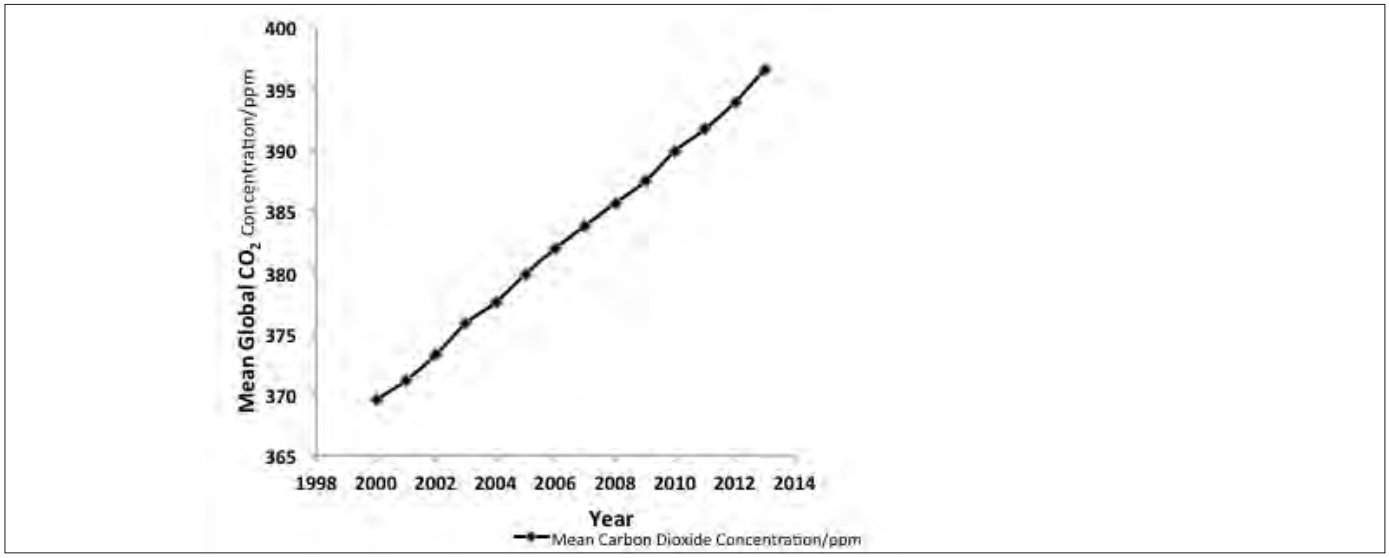

FIGURE 3A: ATMOSPHERIC CONCENTRATIONS OF CO2, 2000-2013

Preliminary data from the National Ocean and Atmospheric Administration (NOAA) show that carbon dioxide emissions continued to rise. Average annual atmospheric concentrations were 396.5 parts per million (ppm) compared with 393.8ppm in 2012 (Figure 3A). In some parts of the world, average annual concentrations were above 400 ppm[4]. Global average temperatures for 2013 tied with those for 2003 making it the fourth hottest year since records began in 1880.

Average global temperature (land and ocean surface combined) was 14.5 C/ 58.1 F. This was 0.6 C/1.1 F above the 20th century average of 13.9 C/57.0 F and 0.2 C/32.4 F above the 30-year mean.

Global Sustainable Development Report – United Nations

The Executive Summary of the prototype Global Sustainable Development Report was launched at the inaugural session of the High-level Political Forum on Sustainable Development on September 24, 2013. This report seeks to "reconnect science and policy," and provides a review of sustainable development for three past generations (1950–2013) and forecasts two generations into the future (until 2050). The analysis showed that the progress towards sustainable development has been mixed and that some progress has been at the expense of worsening trends in other respects. For example, although the world's nations have built cities for over 770 million people over the last 12 years, there are 200 million more slum dwellers today than 20 years ago.[5] The report, which is targeted at policy-makers, takes an integrated approach that looks at clusters of issues and their inter-linkages. Among the top eight emerging sustainable development issues identified were: regional natural resource conflicts; the climate-land-energy-water-development nexus; political instability from increased wealth inequalities; child labour; non-existent or decreasing environmental justice in developing and developed countries; youth unemployment; persistence of poverty in poor and even in rich countries; and anthropogenic reductions in net primary productivity of biological resources.

Natural and Manmade Disasters

Relatively high losses associated with weather-related events in Europe and South-East Asia dominated the overall picture of natural catastrophes in 2013. Typhoon Haiyan, one of the strongest cyclones in history, affected the southern Philippines with maximum wind speeds of over 300 km/h and resulted in approximately 6 000 fatalities. A leading international reinsurer estimated that the most costly natural catastrophes of the year, in terms of overall economic losses, were the flooding in southern and eastern Germany and the neighbouring states. Overall, losses totalled US$15.2 billion, while insured losses came to US$3.0 billion[6]. Globally, the total cost of losses and insured losses from natural catastrophes were estimated at approximately US$125.0 billion and US$ 31.0 billion, respectively. This was below the average figures for the past 10 years (US$184.0 billion and US$56.0 billion). Over 20 000 lives were lost in approximately 880 natural catastrophes, more than twice that of 2012 (9 500). As in the previous year, most of the cost was attributable to hydro-meteorological events. In the USA, for example, losses from severe storms and tornadoes were estimated at US$3.4 billion in insured losses.

Chemicals Management

The 4th Latin American and Caribbean regional meeting on the Strategic Approach to International Chemicals Management (SAICM) and related consultations were held in August 2013. The meeting reviewed progress on implementation of SAICM, identified regional priorities, exchanged experiences, and shared information on activities undertaken at the national and regional levels. The meeting also sought to guide the preparation of the draft document on the Overall Orientation and Guidance towards the achievement of the 2020 goal of sound chemicals

4 http://www.esrl.noaa.gov/news/2013/CO2400.html
5 http://sustainabledevelopment.un.org/index.php?menu=1621
6 http://www.munichre.com/en/media-relations/publications/press-releases/2014/2014-01-07-press-release/index.html

management. Key outcomes included regional agreement on a process for completing a regional action plan, as well as agreed action on endocrine disrupting chemicals (EDCs) and highly hazardous pesticides[7]. The Globally Harmonized System of the Classification and Labelling of Chemicals (GHS) project, financed by SAICM, convened a regional CARICOM meeting wherein a draft Regional Implementation Strategy for the GHS was prepared. The finalisation of the strategy will be guided by national priorities.

The Minamata Convention on Mercury was agreed on at the 5th session of the Intergovernmental Negotiating Committee. Among the areas addressed were the ban on new mercury mines and the phase-out of existing ones; control measures on air emissions; and international regulations for artisanal and small-scale gold mining. Ninety-six countries were signatories to the Convention (including Jamaica), and only one ratified.

Small Island Developing States

Small Island Developing States (SIDS) commenced preparations for the 3rd International SIDS Conference scheduled for Samoa in 2014. The preparation took place across three regions: the Caribbean; the Pacific; and African, Indian Ocean, Mediterranean and South China Sea (AIMS). The outcome from each regional meeting formed the basis for an inter-regional meeting in Barbados. The resulting inter-regional outcome document addressed the common vision for SIDS, highlighted some of the challenges in meeting SD goals since 1994[8], and proposed strategies for achieving SD. It will inform the agenda of the conference and will also be used to influence the post-2015 development agenda.

Spatial Data Management

Consistent with emphasis being placed by the UN on the provision of reliable geospatial data, the Doha Declaration of February 6 resolved "to promote the greater use of geospatial information in sustainable development by supporting the activities under the programme of the Global Map for Sustainable Development (GM4SD) with an initial focus on managing risks of natural disasters to urban populations and developing effective mitigation strategies." The Declaration was the outcome of the Second High Level Forum on Global Geospatial Information Management held in Doha, Qatar. Among the resolutions emanating from the discussions were commitments to collaboratively:

- improve a sustained operational global geodetic reference frame and infrastructure, to support the increasing demand for positioning and monitoring applications with associated societal and economic benefits
- enhance the availability of training programmes at all levels, and to contribute to a global knowledge base that promotes knowledge transfer including the sharing of experiences, best practices, technological trends, supporting legislations, funding strategies, and other technical resources to facilitate and promote capacity development
- affirm the importance of an agreed set of authoritative core global reference datasets that are needed to support global sustainable development activities and to work jointly towards the preparation, improvement and maintenance of these core global reference datasets.

The Declaration also recognized the importance of the role of building national spatial data infrastructure based on internationally accepted standards. This is required for the provision of credible and reliable data to support evidence based decision making and policy formulation on location-based development issues, including disasters and humanitarian needs. The international community also placed emphasis on the development of a statistical spatial framework as a global standard for the integration of statistical and geospatial information. This was the focus of the first meeting of the Expert Group on the Integration of Statistical and Geospatial Information held in November.

Jamaica was represented at the Third Session of the United Nations Committee of Experts on Global Geospatial Information Management (UN-GGIM) held in July. The meeting made progress in fulfilling GGIM's mandate to enhance collaboration and to support the use of geospatial information to promote sustainable development globally.

Among the focus topics for GIS professionals and the research community were the use of Unmanned Aerial Vehicle Systems[9] in geospatial mapping; the emergence of next generation remote sensing service providers which launched a number of demonstration satellites, the emergence of new online mapping solutions such as MapBox and CartoDB; location-based services like GeoTrigger; Open Source GIS; and the development of GIS applications with full analytical and data processing capabilities via the cloud.

SD AT THE NATIONAL LEVEL

Jamaica continued to record relatively strong performance in social indicators, in particular education and health. In education, 75.0 per cent of the school age population (3–24 years) was enrolled in educational institutions while enrolment at the lower levels of the system continued to be universal or near universal. Gross Enrolment Rate (GER) for the pre-primary cohort was 99.9 per cent, and for primary and secondary level, 99.4 and 91.9 per cent, respectively (see chapter on Education and Training). The health status of population was relatively good reflected in average life expectancy at birth of 73.1 years and an average death rate of 5 deaths per 100 000 population. Nonetheless, the incidence of violence-related and other injuries, mental disorders and sickle cell disease were reported to have added to the public health burden. Violence and motor vehicle-accident related injuries were high among the 20–64 age group as was chronic non-communicable diseases. The rate of immunization for children 0–11 months remained high at 91.9 per cent for the period January –September although it declined by 3.1 percentage points relative to the previous year (see chapter on Health). In terms of the general quality of life indicators, preliminary available data from the *Jamaica Survey of Living Conditions* (*JSLC*) *2012* indicated that the household poverty

7 http://larc.iisd.org/news/latin-american-and-caribbean-workshop-agrees-to-complete-saicm-action-plan/#more-213017

8 The Barbados Programme of Action (BPOA) was adopted in 1994 and the Mauritius Strategy for the Further Implementation of BPOA (MSI) in 2005 as the SD pathway for SIDS.

9 An unmanned aerial vehicle (UAV), commonly known as drone, is an aircraft without a human pilot aboard. Its flight is controlled either autonomously by onboard computers or by the remote control of a pilot on the ground or in another vehicle. The typical launch and recovery method of an unmanned aircraft is by the function of an automatic system or an external operator on the ground

TABLE 3.1
SELECTED SUSTAINABLE DEVELOPMENT INDICATORS, 2008 -2013

INDICATOR	2009	2010	2011	2012	2013
Quality of Life					
% of Households with Access to Piped Water	78.7	70.3	n/s	69.9[p]	n/a
% of Households with no means of Excreta Disposal	0.1	0.5	n/s	0.2[p]	n/a
% of Households Squatting	0.6	0.1	n/s	1.0[p]	n/a
Housing Quality Index	70.9	71.5	n/s	72.0[p]	n/a
Poverty and Inequality					
% Household below Poverty Line	12.0	12.4	n/s	14.4[p]	n/a
Share of Poorest Quintile in National Consumption	6.7	6.6	n/s	6.39[p]	n/a
Gini Coefficient	0.3667	0.3813	n/s	0.3748[p]	n/a
Communication					
Fixed Telephone Penetration per 100 population	11.2	10.5	10.1	9.34[r]	9.14
Mobile Penetration per 100 population	110.1	117.6	112.1	100.1[r]	103.1
Internet use per 100 population	57.10	58.5	n/a	n/a	n/a
Environmental					
Rate of Deforestation (%)	0.10	0.1	0.1	0.1	0.1
Energy Consumption per capita (BOE)	7.50	7.5	7.7	7.3	7.3[p]
Alternative Energy ('000 BOE)	966	948	1057	444	556[p]
Per Capita Domestic Water Consumption (Megalitres)	0.034	0.036	0.038	0.035	0.034[p]
Annual Rainfall (mm)	1 566	2 272	1 747	1 567	1 470
Average Annual Temperature (C) [a]	28.0	27.9	27.9	28.0	28.2
Population ('000)	2 686.1	2 695.5	2 704.1	2 711.5	2 718.0
% Population in Urban Areas	52.00	52.0	52.0	54.0	54.0
Per Capita Waste Generation (kg/day)	0.89	0.86	0.7	n/a	0.74

a - average of temperatures for two main international airports
b - January to June 2012
n/a - not available
n/s - not surveyed
p - preliminary
r - revised
BOE: Barrel of Oil Equivalent

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

rate increased to 14.4 per cent compared with 12.4 per cent in 2010 (Table 3.1).

In communications and technology, steps towards becoming a technology enabled society were advanced with an increase in Broadband internet access by 7.7 per cent relative to the previous year. Competitiveness in the ICT sector was also boosted by a high teledensity of 112.1 per 100 population and an increased mobile penetration rate of 103.1/100. Efforts to diversify the energy mix was evident in the increase in the use of alternative energy which increased by 25.2 per cent relative to the previous year.

There was evidence of building resilience in the natural environment through coastal restoration work, reforestation and better environmental management. This was demonstrated by an improvement in the country's rank (55 out of 178 countries) on the Environmental Performance Index (EPI). This eight place advancement was achieved with a score of 58.26 which improved by 3.86 points relative to 2012. High scores were recorded in the indicators Air Quality (96.3), Agriculture (96.0), Biodiversity and Habitat (88.0) and Climate and Energy (76.9)[10]. Jamaica placed higher than most Caribbean countries in the ranking.

Planning and Policy Developments and Legislative Framework

As a priority thematic area, climate change adaptation and mitigation benefited from policy advancements during the year. To this end, a Climate Change Division (CCD) was established in the MWLECC. The CCD has responsibility for coordinating climate change adaptation and mitigation activities for Jamaica. The Climate Change Policy Framework and Action Plan was finalized, approved by Cabinet, and tabled in Parliament as a Green Paper. This effort was led by the MWLECC and funded by the GOJ/EU/UNEP CCADRRP. The policy framework will guide Jamaica's efforts and prescribes priorities in adaptation and complement other policy instruments such as Jamaica's National Energy Policy 2009-2030 and *Vision 2030 Jamaica - National Development Plan.*

10 http://epi.yale.edu/epi/country-profile/jamaica.

TABLE 3.2
BUDGETARY ALLOCATIONS FOR SELECTED ENVIRONMENTAL MANAGEMENT AND RELATED PROGRAMMES, FY 2012/12 - FY 2013/14

	Revised Estimates 2012/13 $'000			Estimates 2013/14 $'000			
	RECURRENT	CAPITAL A&B	TOTAL	RECURRENT	CAPITAL A&B	TOTAL	PerCent Change
Environmental Protection [a]	712 820	381 616	**1 094 436**	776 890	450 663	**1 227 553**	12.2
Waste Management	904 100	116 000	**1 020 100**	721 188	40 000	**761 188**	-25.4
Forestry	436 299		**436 299**	478 111		**478 111**	9.6
Disaster Management [b]	287 337	308 928	**596 265**	297 353	209 000	**506 353**	-15.1
Fire Protection	3 244 215	89 000	**3 333 215**	3 314 082	223 915	**3 537 997**	6.1
Land Resources Management [c]	1 587 070	337 042	**1 924 112**	1 589 068	335 673	**1 924 741**	3.3
Water Resources Management	142 264	10 109	**152 373**	144 427	21 516	**165 943**	8.9
Total	**5 885 105**	**1 242 695**	**8 556 800**	**7 321 119**	**1 280 767**	**8 601 886**	**0.5**

a - Environmental Protection includes NEPA, and environmental management under the MWLECC
b - Disaster Management - Office of Disaster Preparedness and Emergency Management and Emergency Management of the Ministry of HealthHealth
c - Land Resources Management - Land Use Planning and Development (including Squatter Management); Rural Development (survey, land administration, settlement and land reform); and Municipality Development

Source: Estimates of Expenditure for the year ending March 31, 2013 as passed

Zoning plans are among the planning tools which guide the sustainable development of a protected area, particularly by prescribing limits of use. Accordingly, the Interim Zoning Plans for the Negril and Montego Bay Marine Parks were advanced through approval by the Natural Resources Conservation Authority (NRCA), laying the basis for the gazetting of these plans. Work was also conducted on the draft Palisadoes-Port Royal and the Coral Spring-Mountain Spring Protected Area zoning plans.

In the area of pollution prevention and control, the Natural Resources Conservation (Wastewater and Sludge) Regulations 2013 were gazetted. The regulations address licensing for construction, operation and discharge from wastewater facilities; monitoring and managing discharges; and standards for compliance and fees. Related activities included NEPA's commencement of analytical studies relating to urbanization, land use and educational facilities. The Agency also undertook the finalization of a Draft National Settlement Strategy. Other activities included growth centre sphere of influence surveys, mapping and analytical studies for 75 growth centres and 17 emerging growth centres islandwide.

Steps were taken towards the finalization of the National Building Act, the adoption of the National Building Code as a revised draft National Building Bill was discussed with stakeholders, and final drafting instructions given to the Chief Parliamentary Counsel in March. The Bill provides a modern legal framework for the effective regulation and management of buildings and building related activity, to ensure public safety in the built environment whilst promoting sustainable development.

Financing for SD

Budgetary allocations for selected SD thematic areas totalled $8.6 billion for the Financial Year 2013/14, a 0.5 per cent increase relative to the previous year (Table 3.2). This accounted for 0.8 per cent of the total GOJ budget. Environmental protection increased by 12.2 per cent, due in part to investment in capacity building in meteorology and hydrology. Waste management had a decline of 25.4 per cent, reversing the increase associated with Hurricane Sandy clean-up efforts in 2012. In the area of fire prevention, the 6.1 per cent increase was to facilitate the expansion of public education and inspection.

The Environmental Foundation of Jamaica (EFJ) and the Forest Conservation Fund (FCF) are the main environmental non-governmental organisations supplementing expenditure in the environment sector. There were no new calls for proposals during the reporting period because of the end of the financing arrangements for the EFJ under the Enterprise for America Initiative (EAI) and ongoing plans for the merger of the two entities. However, for the period August 2012 to July 2013, the EFJ spent $15.5 million on previously approved projects, compared with $45.3 million in 2012. The thematic areas funded were water harvesting/community water systems; disaster risk reduction; collection processing (recycling); and public education and ecosystems management. These projects, which included leveraged funds from the Inter-American Foundation since 2012, benefited some 4 200 persons directly and 16 900 indirectly. In addition, in the area of recycling alone, some 37 000 students were indirectly impacted. The FCF spent was $43.1 million. Of this, five discretionary grants totalling $1.2 million were awarded. The FCF had 36 active projects covering reforestation of terrestrial and coastal forests, bioprospecting of medicinal plants, agroforestry, sustainable agriculture and community awareness.

Natural Disaster Risk Financing

In addition to the budgetary allocation for general disaster management indicated in Table 3.2, the Government purchased US$122.0 million worth of insurance coverage for hurricane and earthquake damage under the Parametric Insurance Policy with the Caribbean Catastrophe Risk Insurance Facility (CCRIF). The coverage limit was approximately US$62.2 million for damage caused by hurricanes and US$59.8 million for earthquake damage. Coverage for damage due to hurricanes and earthquakes was purchased at an annual premium of US$2.5 million and US$1.5 million, respectively. The 2013/14 policy was discounted by 25.0 per cent on premiums because no pay-outs were made by CCRIF in 2012/13. In response to interest expressed by CCRIF participating countries and stakeholder partners, the Facility also added the new excess rainfall product to its portfolio in 2013/14. This product enhances the existing options to include coverage against damage caused by extreme rainfall events and its triggering of floods and landslides. The excess rainfall product was not included in the coverage purchased by Jamaica.

Jamaica's hurricane policy with CCRIF was not triggered after Hurricane Sandy in October 2012 because losses were below the policy's attachment point or "deductible". The GOJ, however, received a discretionary grant of US$100 000 from the CCRIF to support its post-disaster recovery and restoration initiatives following the effects of Hurricane Sandy. This was ratified by the signing of a Memorandum of Understanding (MoU) between the GOJ and the CCRIF[11].

In October, the Livelihood Protection Policy (LPP), a parametric personal weather insurance product, was launched to provide insurance coverage against extreme weather events for the poor and vulnerable, particularly from the low income community and the agricultural sector. Twelve communities across the Caribbean region have been identified for 'trial' of the policy and will be offered the chance to purchase LPPs. Under the trial, property damage is not explicitly covered, rather, the policy uses a parametric trigger based on actual weather measurements to pay out to policyholders. Jamaica is the second country in the region to have launched the policy.

Climate

Jamaica's average annual rainfall was 1 470mm, a 97mm decrease relative to the previous year and 303mm less than the 30-year mean[12] (Figure 3B). The decline is consistent with a trend of decreasing annual rainfall which has been observed since 2000 and with projections for reduction in precipitation based on climate modelling in Jamaica.[13]

Review of the drought indices indicate that with the exception of the July/August and August/ September periods, average annual rainfall was below the 30-year mean. This was lowest in the January/February period when all but two parishes, Hanover and Westmoreland, experienced normal drought conditions (that is, average rainfall ranging between 41 and 60 per cent of the 30-year mean). St Elizabeth was particularly affected, where nine of the 12 periods recorded drought. In terms of extreme to severe drought, this was experienced in some parishes at different times during the year. The December/January period had the highest incidence of extreme and severe drought conditions, with extreme drought being recorded in Trelawny and severe drought in Westmoreland, Clarendon and St James (Table 3.3).

Average annual temperatures at the Normal Manley International Airport (NMIA) and the Sangster International Airport (SIA) were 28.3 C and 28.1 C respectively (Figure 3C). The SIA temperatures were the highest on record (since 1992). In general, temperatures rose in keeping with climate change projections for Jamaica; this trend is expected to continue towards the end of the century.

Climate Change

Several climate change initiatives were implemented during the year and included: the GOJ/Adaptation Fund "Enhancing the Resilience of the Agriculture Sector and Coastal Areas for Livelihoods Protection and Food Security"[14]; the GOJ/EU/UNEP CCADRRP; and the "Pilot Programme for Climate Resilience" (PPCR). Under the former, engineering designs were completed for the installation of two breakwater systems to protect the most severely eroded section of the Negril coastline and water management facilities installed in three communities.

In addition, the 38-month GOJ/EU/UNEP CCADRRP was completed. The project sought to rehabilitate selected watersheds, restore selected coastal ecosystems, and build institutional and local level capacity in climate change

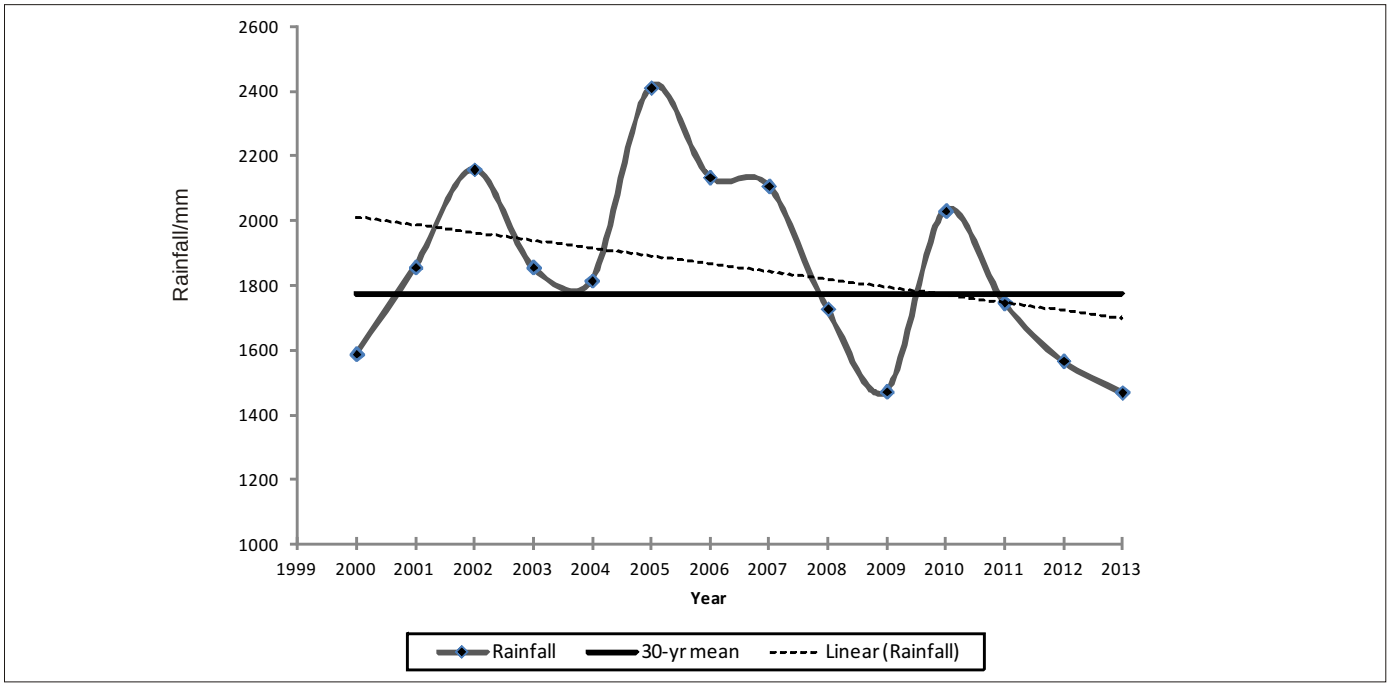

FIGURE 3B: AVERAGE ANNUAL RAINFALL, 1999-2013

11 The funds are to be used to support the rehabilitation of two residential childcare facilities – Muirton and Summerfield – which were damaged by the hurricane.
12 The 30-year mean is an average of rainfall over the period 1971-2000.
13 2012 State of the Jamaican Climate: Information for Resilience Building
14 The project has also been branded as "Building the Resilience of the Agriculture Sector and Coastal Areas".

TABLE 3.3
DROUGHT INDICES BY PARISH, 2013

PARISHES	Dec/Jan	Jan/Feb	Feb/Mar	Mar/Apr	Apr/May	May/Jun	Jun/Jul	Jul/Aug	Aug/Sep	Sep/Oct	Oct/Nov	Nov/Dec
Kingston and St Andrew	48	44	53	63	74	65	56	73	107	98	88	89
St Thomas	36	45	38	63	74	78	79	83	100	90	101	119
Portland	94	55	59	83	103	91	101	133	99	86	91	98
St Mary	84	53	53	99	98	72	70	96	83	72	90	98
St Ann	36	55	67	33	83	76	93	159	125	70	52	78
Trelawny	45	49	62	64	123	126	102	177	143	97	87	66
St James	17	40	84	112	128	127	73	114	174	162	127	83
Hanover	28	65	88	106	113	85	69	100	96	80	102	104
Westmoreland	81	73	102	94	79	89	107	111	146	115	65	84
St Elizabeth	52	41	62	45	37	48	40	58	65	44	44	71
Manchester	87	47	82	66	90	110	77	114	112	81	70	85
Clarendon	68	39	78	71	115	93	47	86	86	55	48	65
St Catherine	104	30	46	60	90	84	97	135	105	83	70	65
Jamaica	64	48	68	73	91	86	74	104	107	85	77	83

Note: Extreme drought: 0-20%; Severe drought: 21-40%; Normal drought: 41-60%; No drought: 61% and over (of the 30-yr mean)

Source: Meteorological Service

adaptation and disaster risk reduction. The first two objectives were carried out by the Forestry Department (FD) and NEPA respectively (see Forestry Resources and Coastal and Marine Resources for details). Capacity building activities completed during the year included:

- public education and awareness building across 12 parishes targeting the public sector, community groups, Local Forest Management Committees (LFMCs), Members of Parliament, students, fisherfolk, farmers, persons with disabilities, special interest groups, vulnerable communities, among others
- review of a draft Ocean and Coastal Resources Management Policy and the drafting of the Policy on the Management of Jamaica's Cays
- implementation of a pilot public education project on climate change and training for community leaders and community members
- the preparation of a socio-economic and environmental status report and land-use/change detection maps for the South Negril/Orange River Watershed under the Risk and Vulnerability Assessment Methodology Project.

Among the achievements of Phase I of the PPCR were:

- installation of 20 automatic weather stations to build on the climate data network of the Meteorological Services

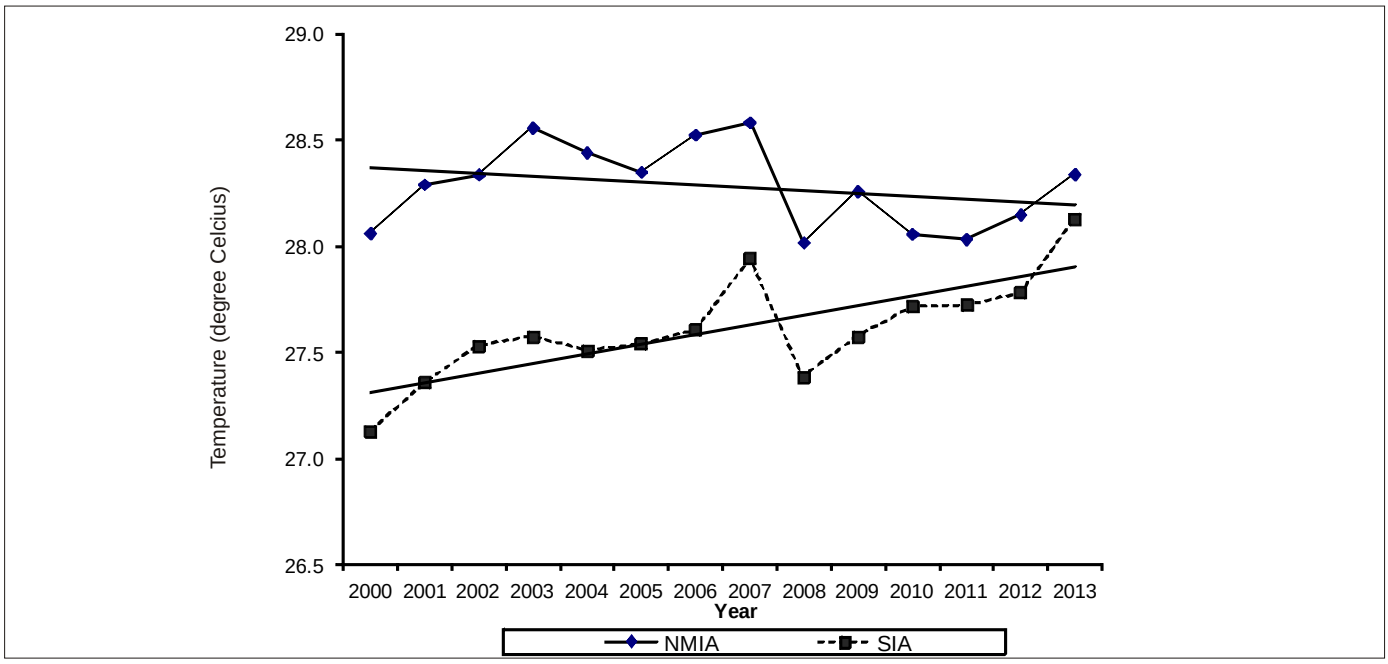

FIGURE 3C: TEMPERATURE AT THE NMIA AND SIA, 2000-2013

– procurement of hydrometric software and two global positioning systems (GPS) mapping units to enhance the ability of the Water Resources Authority (WRA) to conduct spatial, technical and statistical assessments

– development and initialisation of the Damage Assessment Information System (DAIS) to facilitate wider data collection from persons islandwide following disasters events.

Forestry Resources

Forestry resources are managed by the Forestry Department in accordance with the Strategic Forest Management Plan 2010-2014. Activities undertaken and related achievements were primarily in the areas of assessment of forestry resources; reforestation; compliance and enforcement; and public education and awareness building.

The FD's thrust towards sustainable management of forests was supported through the GOJ/EU/UNEP CCADRRP which achieved the following:

– rehabilitation of 50.0 hectares (ha) of land, bringing the total area forested under the programme to 405.0 ha

– assessment of 14 138.5 ha of forested crown lands - The total areas assessed under the project was 110 011.0 ha

– assessments and other activities to support the declaration of 3 700 ha of forests as Forest Reserves or Forest Management Areas

– completion of a Forest Fire Management Plan to guide the FD and other key stakeholders in planning for, preventing and managing forest fires. Maps showing high risk areas were produced

– rehabilitation of the nursery in Constant Spring, St Andrew

– implementation of an agro-forestry programme—farmers across four Local Forest Management Committees (LFMCs) received approximately 60 000 seedlings (fruit and timber trees). Some 400 farmers were registered to the programme. Additionally, five demonstration plots[15] were established: two in Sawyers, Trelawny; and one each in Westphalia, Constitution Hill, and Dallas Castle, St Andrew. One apiary was also established in Constitution Hill through the LFMC

– construction of a retaining wall in Cane River in Dallas Castle, St Andrew—this was built to reduce landslide and related risks in a section of the community.

The Cockpit Country Forest Management Plan was finalised and approved in collaboration with the LFMC. Under the Private Forestry Programme, 698 new applicants were registered, an increase of 169.5 per cent relative to the previous year. This brings the total number of registered farmers to 3 797[16]. Some 92 576 seedlings (equivalent to 184.0 ha of land) were distributed to 502 planters under the programme.

Monitoring and enforcement activities yielded varied levels of success. Thirty permits and licenses were issued for harvesting lumber in forest reserves and estates, up from 14 in the previous year. A total of 487.9 m^3 of lumber (valued at $2.3 million) were harvested during 2013, of which Caribbean Pine accounted for 209.4 m^3 and hardwood trees, 278.5 m^3.

The FD served 107 Notices to Quit and Notices of Contraventions. Compliance was approximately 35.5 per cent, showing an improvement relative to the previous period and necessitating a reduction in the number of court cases pursued.

Public education and awareness raising activities were conducted throughout the year. Among special activities undertaken to mark the 75th anniversary of the FD were two Forest Treks held to increase knowledge of forests among Jamaicans – a 10km hike in St Andrew with 500 hikers and the other in the Cockpit Country, Trelawny with over 200 participants. Over 40 000 seedlings were distributed in the National Tree Planting Day in October, a 276.0 per cent increase relative to 2012. The Inaugural Forest Hero Awards was held in October 2013, where two individuals and two entities were recognised for their work in sustainable forest management. The categories were: establishing a forest plantation, providing media coverage to environmental issues, protecting and conserving forest resources and reforestation.

Coastal and Marine Resources

The status and health of coastal and marine resources were monitored by NEPA. The country's coral reef health index (CRHI), comprising coral index and reef biota index, is monitored biennially. During 2013, the coral index (hard coral cover and recruits) was monitored at 23 sites in 9 locations and reef biota index at 20 sites in 7 locations. The latter involved monitoring of nutrient indicating algae (NIA), herbivorous and commercial fish and presence of *diadema* (Table 3.4). Sixteen of the sites were ranked as poor, six as critical and one as fair. The overall coral index showed that hard coral cover was good, but the recruits were at a critical level (Table 3.5). Herbivorous and commercial fish quantities were at a critical level while those for NIA and *Diadema* were fair. The overall CRHI score of 2.1 across all sites signals that the country's coral reefs are in poor condition[17].

Beach profiles were measured at 36 sites across six parishes by NEPA (Table 3.6, Appendix 3A). The average beach loss ranged from 0.3m to 10.3m and the average gain in beach ranged from 0.2m to 4.6m. Chronic erosion (greater than 25.0 per cent) was seen in five sites—three in Portland, one in Clarendon and one in Westmoreland. Twenty-one sites experienced mild erosion (between 1.0 per cent and 25.0 per cent), 11 of which were in Negril and 7 in Kingston. Accretion was observed in 10 sites, half of which were in Negril. When considering the status of the country's beaches using the sites monitored, there was a net erosion of about 20.8m.

A number of activities were implemented to improve the status of coastal and marine resources. Under the CCADRRP, for example, the following were achieved:

– creation of a spatial database for coastal ecosystems including coastal setback limits, protected areas (PAs), and to guide in decisions on Environmental Impact Assessments (EIAs)

15 Demonstration plots are used to train local natural resource users (such as farmers) in sustainable management techniques.

16 The programme commenced in 1998.

17 Select sites assessed in 2011 were not assessed in 2013.

TABLE 3.4
CORAL INDEX AND REEF BIOTA INDEX, 2013

LOCATION / SITE NAME		CORAL INDEX		REEF BIOTA INDEX			
		HC (%/100m^2)	Recruits (#/m^2)	NIA (%/100m^2)	Herbivorous fish (g/100m^2)	Commercial fish (g/100m^2)	Diadema (#/m^2)
Montego Bay Marine Park (MBMP)	Airport Reef West	28.8	0.5	18.1	958.6	306.9	0.5
	Classroom Reef	23.1	0.0	40.0	1 947.8	41.8	0.0
	Sergeant Major	27.5	0.0	25.6	1 342.3	36.5	0.1
	Sunset Beach Mooring	16.3	0.0	40.6	1 871.4	171.9	0.0
Falmouth	Oyster Bay	24.4	1.8	18.1	803.5	97.9	1.1
	Relocation Site 1	25.0	0.8	47.5	1 752.1	63.3	0.0
	Relocation Site 3	19.4	2.0	47.5	894.8	43.3	0.0
Discovery Bay	Dairy Bull	21.9	0.0	35.6	1 249.8	116.4	0.4
	Pear Tree Bottom	19.4	0.3	45.0	946.0	0.0	0.2
Ocho Rios Marine Park (ORMP)	Dickies Reef	26.9	0.0	3.8	602.4	23.0	1.7
	Dunns River	10.6	0.0	21.9	673.5	0.0	0.7
	RIU Nursery	5.6	0.0	39.4	1 510.1	54.2	0.1
	Sewage End	33.8	0.0	1.9	159.5	10.9	4.4
Boscobel Fish Sanctuary	Channel Edge	36.9	0.0	8.1	147.8	3.8	1.9
Oracabessa Bay Fish Sanctuary (OBFS)	Golden Eye Beach Bar	5.6	0.3	42.5	1 192.3	68.5	0.1
	Outer Bank	27.5	0.0	21.9	509.5	266.0	0.5
	Rock Edge	8.8	0.0	48.8	1 052.1	104.2	0.0
Palisadoes Port Royal Protected Area (PPRPA)	Drunkenman's Cay	23.1	2.3	3.1	n/a	n/a	0.0
	Lime Cay	10.6	4.0	41.3	n/a	n/a	0.0
Westmoreland	Peter Tosh Reef	22.5	0.0	15.0	n/a	n/a	0.0
Negril Marine Park (NMP) (NMP)	Bloody Bay	8.8	0.0	40.0	2 467.4	1 654.5	0.3
	El Punto Negrilo	20.6	0.8	18.8	1 982.8	30.2	1.1
	Little Bay	20.0	0.0	27.5	1 640.9	23.3	0.0

HC - Hard Coral Cover
NIA - nutrient indicating algae
n/a - not available

Source: NEPA

- reforestation of 7.0 ha of mangrove forest and 1 000 m^3 of seagrass beds in Negril; and installation of artificial reefs (Negril and Montego Bay marine protected areas (MPAs)), 150 wave attenuation devices (in Old Harbour Bay) and 19 modular turbulence generators to reduce coastal erosion
- pilot testing of a propriety technology at three sites - Negril, Westmoreland; Font Hill, St Elizabeth; and Discovery Bay, St Ann - aimed at stemming rapid beach erosion and promoting accretion
- establishment of a coastal plants nursery at the Discovery Bay Marine Laboratory and upgrading of the Port Royal Marine Laboratory to provide a constant source of coastal plants
- installation of marine buoys in Negril, Montego Bay and Ocho Rios MPAs
- installation and monitoring of 27 sea surface temperature data loggers
- promotion of alternative livelihoods (organic farming, apiculture, sea moss farming, eco-tourism) in four MPAs (Montego Bay, Negril, Bluefields, Portland Bight) and in St Thomas – 14 projects overall directly benefitting some 700 persons.

Water quality monitoring was carried out in selected locations across six parishes. Parameters tested included nitrates, phosphates, total and faecal coliform, pH, and dissolved oxygen. The results were measured against the Natural Resources Conservation Authority (NRCA) national

TABLE 3.5
CORAL REEF HEALTH INDEX, 2013

	CORAL INDEX		REEF BIOTA INDEX			
	HC (%/100m^2)	Recruits (#/m^2)	NIA (%/100m^2)	Herbivorous fish (g/100m^2)	Commercial fish (g/100m^2)	Diadema (#/m^2)
Value	20.3	0.5	28.3	1 185.20	155.8	0.6
Score	4	1	3	1	1	3
Overal CRHI				2.1		

HC - Hard Coral Cover
NIA - nutrient indicating algae
CRHI - Coral Reef Health Index

Source: NEPA

TABLE 3.6
BEACH EROSION ACROSS 37 SITES, 2012-2013

Locations	No. sites	Beach Width, 2012	Beach Width, 2013	% Change, 2012-13
Portland	5	27.3	21.0	-23.2
Kingston	9	52.3	49.5	-5.4
Trelawny	2	20.9	20.2	-3.3
Westmoreland	2	15.8	13.6	-13.8
Clarendon	2	30.6	22.2	-27.2
Hanover/Westmoreland (Negril)	16	28.0	27.4	-1.9
Average Width (m^3)		29.1	25.7	-12.5

Source: NEPA

ambient and recreational water quality standards[18] and are summarised as follows:

- St Ann – the four sites assessed were Ocho Rios Beach Park, Laughing Waters, Dunns River Falls and Turtle River Park. As with previous years, nitrate and phosphate concentrations exceeded ambient standards. Other parameters at times were also outside of the standards. However, recreational standards were not exceeded
- Westmoreland/Hanover – monitoring of the Bluefields Beach Park and Long Bay Parks 1 and 2 against ambient standards showed that water quality was generally good. Exceptions were noted in the phosphates concentration and, in a few instances, faecal coliform. However, recreational standards were not exceeded
- Portland – at Winnifred Beach and Reach Falls, some parameters (including nitrates, phosphates and total and faecal coliform) fluctuated, in some instances, beyond both the ambient and recreational standards. However, it was considered relatively safe as the recreational standards were exceeded in a few instances
- St James – consistent with other sites and previous years, high levels of nitrates and phosphates were observed at the Montego Bay waterfront. Most other parameters were within ambient and recreational standards.
- St Catherine – water quality at the Fort Clarence Beach and in Hellshire was generally within ambient and recreational standards. Phosphates concentration was the exception where standards were not met in most instances.

Biodiversity

Biodiversity resources are found in terrestrial, coastal and marine ecosystems and are of social and economic value. Efforts to protect and conserve these resources were undertaken by the GOJ and in collaboration with development partners. The United Nations Development Programme-Global Environment Facility (UNDP-GEF) project "Strengthening the Operational and Financial Sustainability of the National Protected Area System" continued. The project is aimed at: strengthening planning and revenue generation; rationalizing and integrating the national system of protected areas; and increasing the effectiveness of protected area management. During the year, activities included the drafting of a Blue Print Model for Jamaican Protected Areas (PAs), and a business plan for the Seville Heritage Park, St Ann. The review of PAs management policy and legislative framework commenced.

Under the "Mitigating the Threats of Invasive Alien Species (IAS)" project, the National Invasive Alien Species Strategy and Action Plan to manage, prevent, control and eradicate IAS was developed. Other results included:

18 Where standards were not in existence, the United States Geological Society (USGS) and Blue Flags standards were used.

- mapping of the Lionfish population islandwide (including prey preferences)
- development and testing of a passive trapping method for capturing the Lionfish
- trapping and eradication of selected IAS in the Hellshire Hills (St Catherine) towards conserving the Jamaican Iguana (*Cyclura collei*)
- preparation of a Pet Trade Pathway Toolkit to guide decision makers on the introduction of IAS in Jamaica
- establishment of a Permanent Biodiversity Display- "Black River Treasures" at the Swamp Safari and other public awareness activities surrounding IAS.

An assessment of Blue-winged Teal (*Anas discors*) and Green-winged Teal (*Anas crecca*) duck populations was carried out in 32 wetlands by NEPA. However, only the Blue-winged Teal was found. The estimated population was 5 665 based on actual counts and extrapolation from eBird data. Previous assessments were conducted in 2001, 2003 and 2010, where the population ranged from 2 000 to 3 000. The difference between the latest and earlier estimates may be due to migration patterns and the time of year that the assessment was conducted.

Relative abundance of game bird populations for 2013 based on observations carried out by NEPA averaged 53 birds per observation hour, 28 of which were White-crowned Pigeon (*Patagioenas leucocephala*), 18 were White-winged Dove (*Zenaida asiatica*), 6 were Zenaida Dove (*Zenaida aurita*) and one Mourning Dove (*Zenaida macroura*). Generally, the breeding season is February to May, with a peak in April. Based on the assessments, the hunting season was opened on August 24 and closed September 29.

The country's strategy towards conserving biodiversity benefited from the sighting of *Turnera campaniflora* in Quaco Rock, Clarendon, the specific area in which the species is endemic. The rare species, along with the *Euhorbia alata* (also endemic to Jamaica), was collected for propagation at the Nature Preservation Foundation's plant nursery. In the Hellshire Hills and on the Goat Islands, a comprehensive floristic study was undertaken through a partnership arrangement between the UDC and others. The study showed that 376 plant species are growing in the area, 229 of which were previously known. Eight new endemic plants were observed.

TABLE 3.7
RESULTS OF WASTE CHARACTERISATION OF THE MPM WASTESHED, 2013

Material	Composition (%)
Compostables (Organics)	62.2
Plastics	12.2
Paper	9.3
Cardboard	5.5
Textile	5.1
Glass	2.8
Metal	2.4
Wood	0.5
E-waste and other	0
Total	100

Source: NSWMA

Jamaica made commitments under the Caribbean Challenge Initiative to conserve some 25.0 per cent of its biodiversity resources by 2020. Efforts to reduce threats to biodiversity identified in the national report to the CBD will be one of the strategies employed.

Water Resources Management

Surface and ground water resources were monitored by the Water Resources Authority (WRA). Some 1 395 stream flow and 3 248 ground flow measurements were recorded. Analysis of the data indicated marked seasonal declines which impacted delivery of water from some National Water Commission sources. This was pronounced during the drought periods. However, no marked decline in annual flows was noted. Monitoring capabilities of the agency was enhanced through the World Meteorological Organisation-CaribHycos Project funded by the EU and France. Under the project, six intensity rain gauges were installed and two soil moisture probes acquired. The latter assisted the National Irrigation Commission (NIC) with analysis on experimental plots in Hounslow, St Elizabeth and Braco, Trelawny.

The National Drought Management Committee was re-established as an inter-agency group to identify and address issues related to drought. Work continued on the GOJ/International Atomic Energy Agency "Evaluating Groundwater Recharge Origin, Dynamics and Pathways in the Upper Rio Cobre Hydrologic Basin" project, one of the initiatives being implemented to monitor water resources. Under the project, stable isotopes are used to determine flow dynamics in the basin and to safe-guard against reduced quantities and poor quality water. A total of 112 samples were collected for testing. Other activities conducted by the WRA included the review of 225 development applications; the processing of 145 new and renewal licenses (including two drill permits); processing of 202 requests for data; and outreach activities geared towards public awareness (inclusive of three teacher training workshops).

Management of Chemicals, Waste and Pollution

A Waste Characterization Study[19] was conducted for the Riverton Wasteshed by the National Solid Waste Management Authority (NSWMA). The data revealed that 62.2 per cent of waste was compostable (food matter). The second highest category was plastics, which averaged 12.2 per cent.

Activities to phase out ozone depleting substances (ODS) in Jamaica continued under the leadership of the National Ozone Unit. The procurement of equipment (multi-refrigerant recovery machines, electronic charging scales and a split air conditioning unit) and hydro-carbon refrigerant was undertaken to demonstrate best practices through a Training of Trainers workshop in which 16 participants benefited. This was supported by ongoing public education.

The volume of waste disposed of at the four wastesheds operated by the National Solid Waste Management Authority (NSWMA) – Riverton/Metropolitan, North-Eastern, Southern

19 Data was collected over a 6-day period during March.

TABLE 3.8
DEVELOPMENT APPLICATIONS RECEIVED AND PROCESSED, 2013

Application Type	Received	Processed	Processed in 90 days	Processed in 60 days	Approved
Planning	271	245	174	110	104
Subdivision	885	900	780	666	667
Environmental Permit	384	361	220	166	256
Environmental License	145	128	83	66	66
Beach License	97	87	64	49	55
Total	1 782	1 721	1 321	1 057	1 148

Source: National Environment and Planning Agency

and Western– totalled 733 602 tonnes[20]. This yielded a per capita waste generation of 0.74kg/day. The agency conducted a waste characterisation study of the Riverton wasteshed to determine the composition of waste in selected communities[21] (Table 3.7). The results show that compostable (organic) material accounted for the majority (62.2 per cent) of waste. Plastics were the second highest, comprising 12.2 per cent. The volume of plastics in national waste continues to grow and pose a threat to environmental health due to poor disposal practices. As part of International Coastal Clean-up Day 2013, NEPA along with local environmental non-governmental organisations and other entities collected waste from selected locations in St Catherine and Kingston. Some 52 547 items were recorded, and eight of the top 10 items were plastics.

Land Resources

Implementation of a system to manage development applications was advanced, while promoting efficiency in the physical planning system at the local level. Emphasis was placed on stemming the growth of squatting and preventative measures were taken against the unsustainable use and development of lands. Progress was also made towards improving the efficacy of planning and sustainable management of cities islandwide.

Development Applications and Management

The number of development applications received by NEPA during the calendar year[22] totalled 1 782; 16.2 per cent more than the previous year (Table 3.8). Close to a half (49.7 per cent) of applications were for land subdivisions followed by Environmental Permits (21.5 per cent). Some 271 planning applications were received and 245 processed. Of the latter, 71.0 per cent was processed within the targeted 90-day period, and 63.2 per cent within a 60-day timeframe. Of the total planning applications received, 38.4 per cent was approved for the year.

TABLE 3.9
NUMBER OF APPLICATIONS RECEIVED AND PROCESSED BY PARISH/MUNICIPALITY, 2013

Local Authorities	Total Building/Planning Applications				Total Subdivision Applications			
	Received	Approved Approved in 90 days	Approved	Pending Still being Processed [a]	Received	Approved Approved in 90 days	Approved	Pending Still being Processed a
KSAC	546	358	514	360	29	1	1	54
St. Catherine	541	523	523	35	81	0	15	70
Portmore	542	302	302	96	4	0	2	-
Clarendon	583	328	408	65	53	0	31	54
Manchester	428	363	363	54	125	4	9	130
St. Elizabeth	616	223	227	6	85	0	11	-
Westmoreland	239	206	212	24	46	36	36	75
Hanover	119	72	117	25	17	0	13	39
St. James	380	340	349	48	28	0	17	46
Trelawny	178	133	134	29	33	0	13	22
St. Ann	420	297	380	92	69	0	91	90
St. Mary	239	172	197	94	23	0	19	71
Portland	203	160	185	56	39	0	30	78
St. Thomas	158	99	99	14	13	1	1	0
Total	**5 192**	**3 576**	**4 010**	**998**	**645**	**42**	**289**	**758**

a - Some data outstanding from various Parish Councils

Source: Ministry of Local Government and Community Development

20 This includes domestic and some commercial waste. Note that it does not include waste from private disposal sites.

21 http://www.nswma.gov.jm/WASTEGENERATIONANDCOMPOSITIONSURVEYREPORT2013.pdf

22 Previous analysis was done for the Financial Year. Data does not include Restrictive Covenant and applications for the Convention for International Trade of Endangered Species (CITES)

TABLE 3.10
ENFORCEMENT ACTIONS FOR THE PERIOD 2011-2013

Year	Enforcement Notice	Cessation Orders	Stop Notices	Notice Of Intention To Suspend	Notice Of Intention To Revoke	Onsite Breach/Warning Notices	Warning Letters	New Court Matters	Total
2011	27	22	3	10	1	339	7	18	**427**
2012	65	13	23	6	0	418	76	13	**614**[r]
2013	58	22	23	33	0	463	143	33	**775**

r - revised

Source: NEPA

Applications for the subdivision of land represented the majority of those that were received, processed and approved. A total of 900 subdivision applications were processed. This number included applications brought forward and reflected effort by the Agency to clear application backlogs from the system. Among the processed applications, 86.7 per cent was processed within 90 days of receipt. Some 75.4 per cent of subdivision applications received in 2013 were approved by NEPA.

A total of 5 837 building/planning and subdivision applications were received by Parish and Municipal Councils islandwide (Table 3.9). This represented an estimated 6.4 per cent decrease relative to the previous year. Some 88.9 per cent of applications required building/ planning approval, of which 10.5 per cent was received by the Kingston and St. Andrew Corporation. Some 33.5 per cent of applications received were from the local authorities (LAs) in St. Elizabeth (616), Clarendon (583) and St. Catherine (541) combined. The Portmore Municipality also received 10.4 per cent of total applications, which was equal to that received by the St. Catherine Parish Council. Similar to 2012, the Hanover Parish Council received the least number of building applications, accounting for approximately 2.3 per cent of submissions.

Of the total building applications received, 77.2 per cent was approved, and of this 89.2 per cent was approved within 90 days (see Table 3.9). Most of the building applications received were for residential developments (76.7 per cent), and were predominantly for residences less than 300m^2 in size. Approximately 12.3 per cent of applications were received for advertisement, while 6.4 per cent of applications were for commercial and industrial developments. Other categories for which building/planning applications were submitted included institutional, mix-use, resort, recreational and the establishing of cell towers. The LAs which received the most requests for development of residences included: Clarendon (13.5 per cent); Portmore Municipality (13.3 per cent); and St. Catherine (12.7 per cent). Manchester and St. James also received a number of residential applications, amounting to 10.0 per cent and 8.2 per cent, respectively. The relatively high proportion of applications in these parishes is indicative of the high population distribution and the associated demand for residential development. At the end of the year, 998 building/planning applications and 758 subdivision applications were pending approval. Customarily, some applications are closed due to lack of adequate information, or rejected.

Among subdivision applications received by LAs islandwide, most were submitted to the parish councils in Manchester, St. Elizabeth and St. Catherine (see Table 3.9). Although 44.8 per cent of applications were approved for the year, approximately 14.5 per cent received approval within the 90-day timeframe; the majority being for subdivisions in Westmoreland.

Subdivision of land for 'nine lots and under' (less than 5 acres) was the main category for applications, amounting to 72.4 per cent of those received. However, similar to the previous year, the least applications were received by the local authorities in Portmore, St. Thomas and Hanover.

The total number of enforcement actions[23] taken against illegal developments islandwide increased by 26.2 per cent to 775, relative to the previous year (Table 3.10). Over a half of these were in the form of onsite breach/ warning notices (59.7 per cent). As with the previous period, warning letters were the second most common means of enforcement issued by NEPA , representing 18.5 per cent of actions taken. Other enforcement instruments used included enforcement notices, cessation orders, stop notices and notice of intention to suspend. Some 33 matters were brought before the court.

Development Applications Project

Continued efforts to improve the development applications process resulted in the following activities:

- The Ministry of Local Government and Community Development (MLGCD) in collaboration with the Cabinet Office and NEPA embarked on the further implementation of the Applications Management and Data Automated (AMANDA) Software/System. The AMANDA is expected to provide users and clients with an efficient means of managing and tracking the development applications review process. To date, the software has been implemented in nine LAs namely: the KSAC, Portmore, Trelawny, St. James, Manchester, St. Elizabeth, Clarendon, St. Catherine and Hanover. Other areas of improvement in the system included the introduction of a help desk and the standardization of:
- the process flow customized for each LA
- documents such as application forms, checklists and inspection forms/letters to create ease in doing busi-

23 This data does not include information from Local Authorities

ness with all LAs. The relevant forms are available on the MLGCD's website

– the fee structure (which is currently being developed)

– the building code.

The Development Assistance Centre (DAC) at NEPA received queries and provided advice to 399 clients, 12 more than the previous year. Advice was provided to walk-in visitors as well as through 73 pre-consultation and facilitation meetings. A total of 86 technical information documents (TIDs) were issued to clients to aid preparation and submission of applications. Between April and December, the DAC dispatched 92.0 per cent of TIDs within 14 days of meeting, surpassing the targeted 85.0 per cent for this period. Some 91 development proposals were received, of which 46 were submitted either directly or indirectly to the Agency after receiving assistance at the Centre.

Development Orders and Plans

The thrust towards planned and orderly development across the island continued with:

– four Provisional Development Orders being promulgated for the parishes of Manchester, Portland and Trelawny as well as the Negril and Green Island area which spans Westmoreland and Hanover

– review and update of aspects of the Draft Kingston and St. Andrew Development Order. Eight stakeholder consultations were held during the process. Zoning proposals were prepared as part of activities towards the preparation of the Red Hills Local Area Plan

– completion of the draft of the Clarendon Parish Development Order

– preparation of the Draft St. Elizabeth Development Order commenced, and included the finalization of land use maps, land use surveys and digital land use data entry for 15 Local Planning Authorities/Rural Settlement Nodes.

Land Divestment

The amendment to the Crown Property (Vesting) Act (1960) to enshrine the Land Divestment Advisory Committee (LDAC) in statute was completed. The amendments outline the composition of the committee, its appointment and other related matters. The LDAC processed 93 applications (including resubmissions) for acquisition of government-owned property recommended by the Commissioner of Lands. Of this total, 72 applications were recommended by the Committee for divestment and 67 approved. The projected revenue based on the approvals for the sale and lease of government-owned lands was approximately $206.0 million, an increase of 75.8 per cent.

Squatter Management

Activities undertaken towards the management of squatter settlements throughout the island included the following:

– identification of some 369 lots in four informal settlements for the preliminary stages of regularization by the Ministry responsible for Housing

– lands in Leith Hall, St. Thomas being compulsorily acquired for the proposed regularization of squatters (approximately 2 000 households). These will be transferred and declared under the National Housing Act

– relocation of 26 squatter dwellings from Pear Tree Bottom in St. Ann by the Housing Agency of Jamaica (HAJ)

– containment of eight squatter settlements by various state agencies. Squatters along the Jamaica Railway Corporation corridor were placed under containment pending a proposal for relocation to facilitate divestment of the railway lands and contiguous areas

– demolition of four structures which were being used for squatting

– issuance of 52 notices to illegal occupants of Crown lands.

Land Titling

The Land Administration and Management Project (LAMP) phases I and II continued to facilitate increased access to secure tenure islandwide. Some 1 062 applications for titles were lodged at the NLA, 28 fewer than in 2012. A total of 996 titles were issued from first registration applications, a 12.8 per cent increase relative to the previous period. At 1 548, the number of cases initiated by clients decreased by 14.6 per cent. Other activities included the completion of 495 new surveys,[24] and the amendment of 55 existing survey plans. Some 139 survey diagrams were updated by way of surveyors' declarations.

TABLE 3.11
NUMBER OF GENUINE FIRE CALLS, 2012-2013

PARISHES	2012	2013	% Change
Kingston and St Andrew	2 520	2 476	-1.7
St Thomas	753	646	-14.2
Portland	240	241	0.4
St Mary	267	336	25.8
St Ann	733	704	-4.0
Trelawny	429	311	-27.5
St James	1 049	992	-5.4
Hanover	502	262	-47.8
Westmoreland	588	543	-7.7
St Elizabeth	717	656	-8.5
Manchester	733	876	19.5
Clarendon	1 099	1 094	-0.5
St Catherine	2 334	2 697	15.6
Total	**11 964**	**11 834**	**-1.1**

Source: Jamaica Fire Brigade

24 New surveys were carried out by Geoland Title Limited

TABLE 3.12
IMPACT OF FIRE, 2010-2013

Impact	Category	2010	2011	2012	2013
Deaths	Adults	34	9	23	14
	Children	12	11	11	5
	Firefighters	0	0	0	0
	Total	46	20	34	19
Injuries	Adults	56	31	68	44
	Children	2	10	3	9
	Firefighters	15	15	13	17
	Total	73	56	84	70
Rendered Homeless	Adults	1 188	1 402	1 549	1 232
	Children	663	811	859	598
	Firefighters	0	0	0	0
	Total	**1 897**	**2 213**	**2 408**	**1 830**

Source: Jamaica Fire Brigade

Natural and Manmade Hazards

Fires

The number of genuine fire calls was 11 834 as reported by the Jamaica Fire Brigade, a 1.1 per cent decrease relative to 2012 (Table 3.11). The incidence of fires in most parishes, with the exception of St. Mary, Manchester and St. Catherine remained unchanged or reflected decline. Most fires (2 697) were reported in St Catherine, which registered a 15.6 per cent increase, followed by Kingston and St Andrew (KSA), with 2 476 fires, 44 fewer than 2012. The data show that the largest number of fires was reported in parishes with high urban population, namely St. Catherine, KSA, Clarendon and St. James.

The total number of deaths associated with fires was 19, a decline from the 23 reported in 2012 (Table 3.12). Fire-related deaths among children fell to five relative to the previous year but the number of children receiving injuries tripled to nine. Overall, there were 70 fire-related injuries, 32 of which were in KSA. Males accounted for the majority of deaths (84.2 per cent) and injuries (79.2 per cent).

Eighty-eight per cent of the fires were non-structural, with bush fires accounting for 66.0 per cent (Figure 3D). Bush fires have been on an upward trend in recent years. Nonetheless, the approximately 1 000 residential fires reported damaged personal property rendering 1 830 homeless. Most of these were in the KSA which accounted for the highest percentage (34.5 per cent). About 600 children were among those rendered homeless. Overall, the number of persons rendered homeless declined by 24.0 per cent with the number of affected children declining by 34.4 per cent compared with 2012.

Earthquakes

Seismic and earthquake related activities are monitored by the Earthquake Unit of the University of the West Indies (UWI). During the reporting period, 226 earthquakes were recorded, 6 more than 2012. Eighty-three of these were local (land-based) (Figure 3E), of which 43 were of magnitude 2.1 to

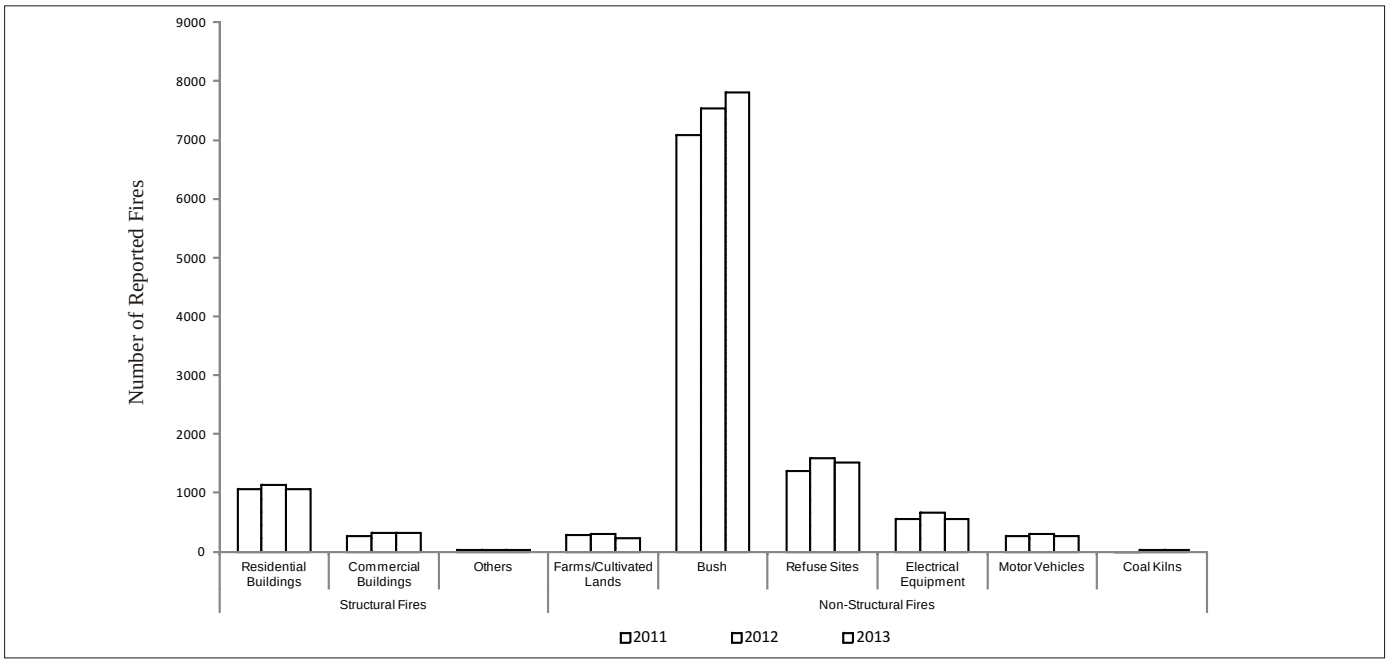

FIGURE 3D: CLASSIFICATION OF FIRES, 2011-2013

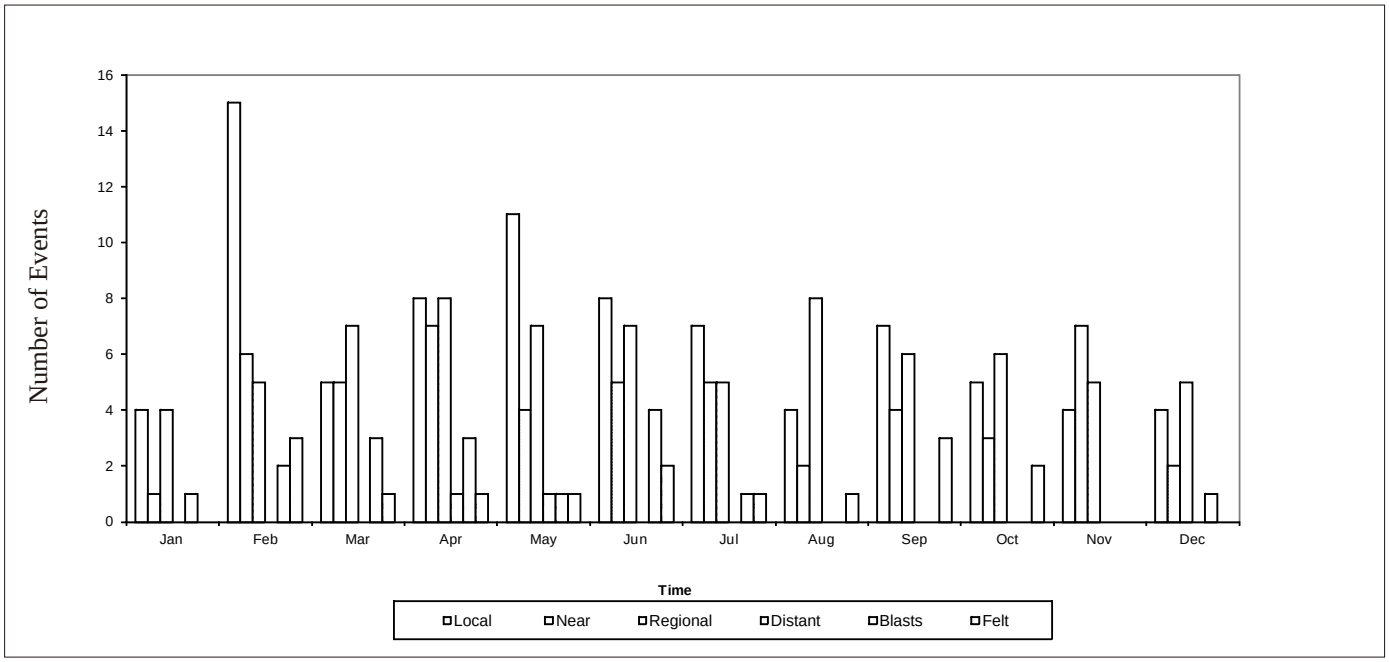

FIGURE 3E: EARTHQUAKES IN JAMAICA, 2013

3.0 on the Richter Scale; 23 of magnitude 3.1 to 4.0; and 2 of magnitude 4.1 to 5.0. The two strongest earthquakes occurred in the Montpelier-New Market Belt in western Jamaica. Sixteen of all the recorded events were felt.

Among the seismic-related activities carried out were the following:

– The Seismic Microzonation of Kingston Harbour Study was completed. The study provided data on ground acceleration/motion of the Kingston Harbour

– Upgrade of seismic network continued bringing to four the number of broadband seismic unit. These units will replace the existing analog units.

The EQU continued to collaborate with local and international entities to share data and information for planning towards the development of a tsunami warning system for the Caribbean and for other potential seismic related events.

Disaster Preparedness and Mitigation

Progress was made in implementing the Disaster Risk Reduction Framework for the period 2012-2015 under the leadership of the Office of Disaster Preparedness and Emergency Management (ODPEM) in collaboration with key partners. The Framework articulates four outcomes and is aligned to Vision 2030 Jamaica and the Global and Regional Strategy/ Framework. Key achievements during 2013 were as follows:

– Under Outcome 1, which seeks to build community capacity to cope with climate change and reduce disasters, 14 Community Disaster Risk Management Groups were established; nine Community Disaster Risk Management (DRM) Plans developed; and 12 Community Emergency Response Teams were established

– Mainstreaming disaster risk management (DRM) under Outcome 2. The tourism sector benefitted from two Emergency Operations Centre workshops for private and public sector entities; two Initial Damage Assessments training sessions; and a number of Basic Disaster Risk Management (BDRM) sessions with hoteliers and other stakeholders. Sensitisation and training were carried out for the education, agriculture and health sectors. In addition, over 100 businesses underwent hazard specific training and 50 representatives of faith-based organisations were trained in shelter and shelter management

– Completion of Guidelines for Community Hazard Mapping under Outcome 3. These were used in undertaking the Annotto Bay Multi-Hazard Assessment (including hazard, vulnerability and risk assessments), and seismic assessments and storm surge modelling for Falmouth, Trelawny. A seismic assessment for Linstead, St Catherine and mapping of over 4 600 assets in Negril (Westmoreland and Hanover) was carried out towards a comprehensive vulnerability analysis under the GOJ/Adaptation Fund Programme

– Five community alert systems were installed; early warning systems (EWS) for hazards improved; and a National Alert and Mass Notification System to send alerts on flooded areas was advanced under Outcome 4 aimed at preparedness, mitigation and response.

A Rapid Visual Screening was conducted under Outcome 3 to assess seismic vulnerability, provide data for earthquake planning and response and recommend structural and non-structural measures to reduce risks. Seventy-seven critical facilities were screened including 37 Police stations, 33 health centres and seven fire stations. The results showed that 19.0 per cent, 30.0 per cent and 14.0 per cent of the police stations, health centres and fire stations, respectively, are likely to withstand seismic events. Factors which would contribute to failure include irregularities in the design of the buildings, and soil types.

TABLE 3.13
SELECTED GIS GROWTH AND DEVELOPMENT INDICATORS, 2013

	2012	2013
Sample Size		
Number of respondents to questionnaire	17	23
Capacity		
Number of organisations that use GIS Services	17	23
Number of organisations that use and provide GIS Services	8	10
Number of organisations that have integrated GIS into its mainstream operations or business processes	10	14
Average number of GIS positions in organisations	3	4
Average number of persons who perform GIS tasks but not employed to a GIS position	5	7
Number of persons trained and educated in GIS in entities sampled	Certificate Level - 50	33
	Diploma - 4	7
	Graduate - 13	25
	Post-Graduate - 10	22
GIS personnel lost to migration	5	2
Functional Data Servers	14	31
Functional Plotters	15	25
Functional Large Format Scanners	10	18
Finance		
Average Gross Annual Salary paid to GIS Personnel ($ million)	2.0	1.7
Number of respondents earning over $1.0 million from new and existing geospatial products and services	1	1
Standards		
Number of organisations with documented policies on data sharing, ownership, maintenance and liabilities	12	10
Average number of staff dedicated to metadata management	1	1
Number of organisations involved in metadata management	9	14
Accessibility of Geospatial Data		
Average number of GIS software licences	4	5
Number of Internet map services	5	11
Number of organizations that sell spatial data	7	7
Awareness		
Average number of workshops, conferences, training courses etc. attended by staff	Local Conferences/Seminars - 3 Local training (2-5 days) - 1	Local Conferences/Seminars - 1 Local training (2-5 days) - 1
Number of persons involved in GIS professional associations	15	36

Source: Data compiled from survey conducted by PIOJ .

SPATIAL DATA MANAGEMENT

GIS Growth Evaluation

Growth and development in the area of geospatial information management was evaluated through information collected from the annual GIS Growth Evaluation Survey of GIS professionals from 47 agencies. Of the 23 respondents, 18 were from the public sector and five from private sector agencies. All respondents stated that their organisations used GIS services while only 10 respondents (43.5 per cent) used and provided GIS services. GIS and related technology was reportedly mainstreamed into the operations and business processes of 14 agencies (60.9 per cent of respondents). Among these were education, electoral boundary management, hazard vulnerability assessment, site suitability modelling, transportation planning and management, management of geological resources, and water quality assessment. As a result of this mainstreaming, agencies reported cost savings of up to $58.0 million due primarily to a reduction in the need to outsource GIS projects and a reduction in the risk of financial loss due to improved decision making. Consistent with the global trend of increased data sharing services, there was an increase of 120.0 per cent in the reported number of internet map services compared with last year. Among the types of data shared with external and internal clients was information on educational services, water resources, topographical data, lifestyle and networking and public works. There was a commensurate increase in the infrastructure to support these services with a 121.4 per cent increase in the number of functional data servers. The status of selected GIS indicators is shown in Table 3.13.

Geospatial Data Creation

– **Portmore Land Use Map**
The Portmore Land Use Map was created to support the preparation of the Portmore Municipality Local Sustainable Development Plan. The map which represented land use in 38 categories, was completed through collaboration between the Portmore Municipal Council and the National Spatial Data Management Division (NSDMD). The map was prepared through a land use survey of the municipality which captured spatial data layers including the distribution of drainage, street lights, fire hydrants and entertainment facil-

BOX 1: LARGEST LOSSES AND GAINS BY LAND COVER CLASS, 1968-2009

Between 1968 and 1999 losses and gains were observed for the following land cover classes:

Land Cover Class With the Largest Losses	Area (million m^2)
Plantation	11.59
Broadleaf Forest	1.94
Swamp Forest	1.92

Land Cover Class With the Largest Increases	Area (million m^2)
Buildings and Other Infrastructure	11.29
Fields and Secondary Forest	3.22

Between 1999 and 2009 losses and gains were observed for the following land cover classes:

Land Cover Class With the Largest Losses	Area (million m^2)
Fields-Herbaceous	7.81
Plantation	5.93
Secondary Forests and Fields	4.48

Land Cover Class With the Largest Increases	Area (million m^2)
Fields and Secondary Forest	10.24
Buildings and Other Infrastructure	3.62
Herbaceous Wetland	3.12

Source: Negril-Orange River Land Cover Mapping and Change Detection Analysis – Change Analysis Report, PIOJ

ities. The data have assisted the municipality in the execution of business processes such as enforcement, analysis of development trends, and the identification of new evacuation routes.

– **Acquisition of Large Scale Satellite Imagery**
A contract was signed for the acquisition of islandwide satellite imagery through a joined-up approach involving public and private entities within the Land Information Council of Jamaica (LICJ). Each entity will be provided with a licence to access and use current 11 100 km^2 of 0.5m resolution imagery of the island inclusive of coast and cays. The imagery will be referenced to the JAD 2001 datum and provided in 16 bit – Geo TIFF format. It will support a variety of remote sensing-related analysis and assist in the preparation of the National Spatial Plan. The imagery was purchased at a cost of approximately US$274 000.00.

– **Technical Revision of Electoral Boundaries Datasets –** GIS and related technology assisted in the process of visualizing and adjudicating the delineation of electoral boundaries. The objective of the task was to produce improved technical descriptions of spatial datasets and spatial accuracy of digital boundaries. This was done in the parishes of Manchester, Portland, St. Catherine, St. Ann and St. Elizabeth.

– **Jamaica Urban Transit Company (JUTC) Bus Routes**
Maps for all JUTC routes were created and uploaded to the agency's website. Visitors to the site are able to query and display maps based on the route number. The JUTC routes database was adjusted to reflect changes to the route network including the removal of the transfer system in Half Way Tree and the consequent addition of four 'straight' express routes.

Geospatial Analysis

Geospatial methodologies and technologies were utilised to conduct analysis in a number of projects and research activities such as disaster risk management, modelling spatial trends in land use and development including the following**:**

The Risk and Vulnerability Assessment Methodology Programme (RiVAMP II) –undertaken with funding from the CCADRRP, utilized GIS and remote sensing technology to conduct land use change detection analysis for the South Negril-Orange River watershed. This was done through the preparation of land cover maps of the area for 1968, 1999 and 2009 (Appendix 3B). The exercise contributed to the more general objective of assessing the status of terrestrial ecosystems in the watershed. Box 1 indicates largest losses and gains for specific land cover classes.

Hurricane Sandy Recovery Project

In support of the Hurricane Sandy Recovery Project, GIS analysis was used to map damage to the agricultural sector; the effects of storm surge on the coastal environment; damage to schools, hospitals and health centres; and impact on affected households (Appendix 3C). GPS technology was also utilised to collect data on the location and condition of all 278 ODPEM Emergency Shelters for the parishes of St. Thomas, St. Mary, Portland and St. Catherine.

Ananda Alert Mapping

The NSDMD collaborated with the Office of the Children Registry to map and analyse data on missing children for the period 2011 to 2013 based on the Ananda Alert System. The main indicators analysed were the number of missing children by parish and community; time of day ratio for missing children for a given period; and time when last seen. The findings showed that the highest number of alerts were for the parishes of Kingston and St Andrew, in particular, communities in the south of Kingston and south west St Andrew. Outside of the KMA, urban areas in the parishes of St. James and St. Catherine featured as hotspots.

TABLE 3.14
LICJ GIS TRAINING AND EDUCATION CONDUCTED BY THE NSDMD, 2013

Courses	Level of Participation	Number of Participants
Geospatial Technologies for Telecommunications	Technicians	5
Fundamentals of GIS & GPS	Technicians	3
Geospatial Solutions for managing the Ministry of Water Land Environment & Climate Change	Managers and Secretary	7
GIS & GPS for Landuse Data Collection	Technicians	5
GIS Programming (Advanced)	GIS Professionals	16
	Total	**36**

Source: Land Information Council of Jamaica/National Spatial Data Management Division

Geospatial Web Applications

Government GIS service providers facilitated the sharing, availability and accessibility of geospatial data through the development and maintenance of GIS-enabled web applications. These included:

Water Resources Information System – Webmap – the second version of this GIS web-based application was developed to facilitate spatial representation and retrieval of hydrologic data from Jamaica's hydrologic basins and watershed management units. Developed by the WRA, Webmap features hydrologic layers based on GPS technology, and data collected from the organization's hydrologic network which can be outputted in a ready to use format. The Webmap also hosts sewage treatment effluent discharge data provided by the Ministry of Health and has reduced the need to process written requests for data dissemination.

Disaster Management Application – Phase 1 of this application was developed and launched by the NWA during the period. The GIS web-mapping service is built to collect, analyse and present Emergency Operation Center data in the event of a natural disaster. It allows rapid and early contingency response to reported events, tracks multiple incidents and resources, and communicates activities across the NWA offices. It performs various geoproccessing tasks such as shortest path/route, database query on temporary road closures, and location of critical facilities like hospitals and shelters.

Demographic Web Maps were prepared and made available to the public via the Statistical Institute of Jamaica's website. The map service was created using open source GIS software. The maps allow for multi-census comparison and queries by sex, population by parish, household tenure and other demographic variables and quality of life indicators.

Database Development and Management

Among the spatial databases created and updated during the period was those to support development planning and the management of protected areas. These included:

– **The Protected Areas Database** updated with zoning plans for three protected areas, namely The Negril Marine Park, The Montego Bay Marine Park and Coral Spring-Mountain Spring Protected Area (Appendix 3D). The exercise which was conducted by the Protected Areas Branch (PAB) of NEPA utilised a combination of GPS technology and GIS software, and ground verification methods.

– **The All Jamaica Database** designed to map and manage geo-spatial features for all applications such as subdivisions planning, location of cell-sites, air quality monitoring, processing of beach licenses and environmental permits and the management of fish sanctuaries and protected areas. The database supports spatial analysis and the creation of site maps for use in applications, presentations and reports within NEPA. For the period, approximately 1 740 applications were mapped.

Capacity Building and Awareness

Training

Cadastral Mapping and Land Registration – The country's capacity towards the preparation of a national digital cadastre and a National Spatial Data Infrastructure was strengthened through a customized training programme on "Cadastral Mapping and Land Registration" in South Korea in October. A ten-member delegation from the Ministry of Water, Land, Environment and Climate Change participated in the training which was organized by the Korea International Cooperation Agency and the Korean Cadastral Survey Corporation.

Six GIS training courses were delivered by the NSDMD in collaboration with the LICJ. Thirty-six executives, managers and technicians (21 males and 15 females) were trained in both introductory GIS topics as well as customized subjects as indicated in Table 3.14.

Awareness

Awareness on the use and capabilities of GIS was enhanced by the use of social media by the NSDMD and LICJ. National and international GIS activities and events were publicized through various social media. In addition, **Geography Awareness Week and GIS Day** 2013 were staged under the Jamaican theme "**Geospatial Solutions Addressing Global Challenges"**. Commemorative activities included the 6th Annual GIS Business Executive Forum held under the theme "Geospatial Capabilities for Jamaica's Insurance Industry"; a **GIS Technical Seminar;** the **11th GIS Day Exposition;** and **LICJ Booth Exhibit and GIS Sensitization Sessions** at the Convent of Mercy Academy Alpha IT Exposition.

OUTLOOK

Actions towards building resilience in the natural environment, improving climate change adaptation practices and facilitating improvements in development planning should continue with the implementation of key climate change related projects and programmes and planning policy initiatives. Among the technical cooperation projects expected to strengthen the robustness of the environment is the GOJ/Adaptation Fund Programme which will seek to increase the climate resilience of the Negril coastline and enhance the climate resilience of the agricultural sector by improving water and land management in selected communities in badly degraded watersheds. The implementation of projects submitted under three investment proposals are scheduled to commence in 2014 under Phase II of the PPCR. These projects will, among other things, improve the quality of climate information for effective planning and action at local and national levels; mainstream climate change into development plans and planning processes; increase adaptation to the impacts of climate change by stakeholders in vulnerable sections of the Rio Bueno and Rio Minho river basins; and institutionalise financing mechanisms for climate change adaptation initiatives by the private sector and community based organisations. Both projects are also expected to increase climate change awareness of the general public.

The JICA Data Collection Survey of the Disaster Risk Management Sector in Jamaica should provide recommendations on priority areas to be supported for improving the management of flood, storm/storm surge, landslide and earthquakes. In addition, four hillside communities in St. Andrew and Portland should benefit from the construction of a network of drains and channels and rainwater harvesting strategies which will reduce the risk of landslides in those areas.

The development planning framework is expected to be strengthened by the completion of a number of development orders and policies namely, the Kingston and St Andrew Development Order; the implementation of the Kingston Urban Renewal Programme; and the full implementation of the AMANDA application in all local authorities by the end of 2014.

Investment to support this roll-out is expected to be provided under an upcoming project. The anticipated finalization and promulgation of the National Building Bill will facilitate the adoption and efficient application of national building standards to ensure safety in the building environment.

Geospatial analysis and mapping capacity will be enhanced by the acquisition of islandwide high-resolution satellite imagery. The completion of the land cover mapping of the island using GIS and remote sensing technology should provide information to support an assessment of the rate of deforestation and the change in forest cover over the last 15 years. The sharing and accessibility of spatial data should also be improved by the revision of the Metadata Policy and the roll-out of Jamaica GIS Online, a web-mapping service to facilitate the sharing of Jamaica's geospatial data.■

CHAPTER 4

SCIENCE, TECHNOLOGY AND INNOVATION

INTRODUCTION

Jamaica's growth strategy continued to target issues of low levels of competitiveness, high energy costs and bureaucracy in business processes. Accordingly, the country's drive to create more competitive business structures, in keeping with *Vision 2030 Jamaica – National Development Plan*, benefitted from:

- the adoption of more than 50 national product and service standards, at least half of which were geared towards the Information and Communication Technology (ICT) sector
- an increase in the number of Conformity Assessment Bodies accredited to ISO/IEC 17025:2005 or 15189:2007 and companies certified to ISO 9001:2008 standard
- the attainment of 'consolidated state of the practice' status by the International Centre of Environmental and Nuclear Sciences (ICENS) for its Neutron Activation Laboratory, putting it on par with top performing laboratories across a number of regions.

The introduction of a number of e-government services, such as the One Stop Business Registration 'Super Form' (BRF1), which allows a single application for the incorporation of companies or registering business names, enhanced the ease of doing business. This was complemented by the establishment of the National Security Interests in Personal Property Registry for Jamaica (Collateral Registry). The registry allows for the registering of notices of security interests in personal property (collateral) and facilitates the search for notices of other existing security interests.

Though the country continued to register a decline in ranking in the global e-readiness indices, investments were made to stimulate growth in the ICT sector. These included the development of infrastructure, improved access to broadband[1] services, adoption of service standards, and increased availability of e-government services. In November 2013, *eGov Jamaica Limited*, formerly Fiscal Services Limited (FSL), was launched as a full service ICT company, to provide service to both public and private sector companies. At the community and domestic level, increased internet access was facilitated through expanded broadband coverage and establishment of additional Community Access Points[2] (CAPs) in strategic locations such as schools, public libraries, post offices and other institutions.

The country made progress in the areas of science education and technology-enabled learning. The rollout of the Technology Enrichment Programme (TEP), an initiative of e-Learning Jamaica Company Limited (e-Ljam) contributed to improved performance in numeracy and literacy skills among students in the 30 targeted high schools. At the tertiary level, expanded programme offerings in science and engineering at The University of the West Indies (UWI) and the University of Technology, Jamaica (UTech) were achieved, in response to market demand.

GLOBAL TRENDS IN STI

The level of global investment in research and development (R&D) as represented by the world Gross Expenditure on Research and Development (GERD) grew by 3.7 per cent to approximately US$1.5 trillion. The United States of America (USA) with an expenditure of US$423.7 billion, continued to have the largest investment in R&D. Expenditure increased by 1.2 per cent compared with 2012, while maintaining a GERD to GDP ratio of 2.7 per cent. Europe[3] and China rounded out the top three spenders at US$349.5 billion (1.9 per cent of GDP) and US$220.2 billion (1.7 per cent of GDP) respectively. BRIC[4] countries also showed increase in R&D spending compared with 2012, from a low of 4.0 per cent in Russia to a high of 12.2 per cent in India.

The USA, BRIC, and European countries accounted for about 70.0 per cent of the R&D investments worldwide. Countries in the rest-of-the-world accounted for the remaining $500.0 billion in R&D expenditure. Areas of investment focus included energy generation and efficiency; chemicals and advanced materials; healthcare and biotechnology; agriculture and food production; information and communication technologies; and automotive, aerospace and military applications.

1 Broadband refers to high-speed data transmission in which a single cable can carry a large amount of data at once; characterized by multiple channel capacity.

2 Community Access Points were established with support of the Universal Services Fund. The fund is a fulfilment of the Universal Service Obligation which required the intervention of the Government to promote universal service by providing the access facilities or funding.

3 Group of 34 countries, most of which are members of the European Union (EU)

4 The group of economies, Brazil, Russia, India and China which are deemed to be at similar stages of economic development and whose combined economies are projected to surpass those of the current wealthiest nations by 2050

Scientific breakthroughs[5] in 2013 included:

– **Extraction of fuel from 'fire ice'**: methane was successfully extracted from frozen stores of gas hydrates buried below the ocean floor. These large reserves of natural gas represent an estimated 10 quadrillion cubic feet of harvestable methane which could be added to the global fuel supply. Commercial production of methane could begin within the next decade, barring any major environmental or technical impediments.

– **Smart phones used as medical instruments:** an iPhone was transformed into a field microscope with double-sided tape and a glass lens. At a 50x magnification, the device is powerful enough to spot many parasites. This technology was tested in Tanzania to diagnose parasitic infections and has implications for broader use due to its simple, inexpensive set up, portability and easy transmission of data.

– **The first cultured beef patty[6] was produced from stem cells of two donor cows in Belgium**: as the global demand for protein rises, it is expected that a peak meat production will eventually be reached, as resources available to raise animals diminish. Lab-cultured meat could, over time, become the solution, though it could take as much as 20 years to bring production to an industrial scale.

Highlighted inventions for 2013 show potential for commercialization and wide scale adoption (Box 4.1).

BOX 4.1 Selected Inventions in 2013

GravityLight: this ballast bulb uses the weight of rocks or other material attached to a series of plastic gears, which work in unison to spin an electric motor. The motor in turn may be used to power small light-emitting diodes (LEDs) or other low voltage devices. This device could provide a cheap, safe source of lighting in remote locations.

Bounce Imaging Explorer: a wireless, data gathering grenade, which can be tossed into potentially dangerous situations such as firefighting missions, disaster and combat zones. This baseball-size probe has a shock-absorbing shell embedded with cameras, near-infrared LEDs to light up dark rooms. Once deployed, it takes photographs, tests for methane, carbon monoxide and elevated temperatures. A microprocessor inside the ball converts the raw data for transmission over Wi-Fi to a smart phone, within seconds of being tossed.

WindMaker: a welding helmet to make metalwork safer, operates by drawing fresh air from behind the helmet, pushes it through a High Efficiency Particulate Air (HEPA) rated filter, and then blows it toward the front, cooling skin while preventing fog on the glass faceplate. A fan near the chin helps expel air, blowing away toxic smoke in the work zone. LED lights on each side of the faceplate illuminate the welding job, while a thick shroud deflects sparks. The convenient combination of eye, heat, spark, and respiratory safeguards could provide greater levels of protection for welders.

Source: Popular Science, January 2014

STI AT THE NATIONAL LEVEL

POLICY AND REGULATORY FRAMEWORK

In the Energy sector, amended regulations for the Petroleum Quality Control Act (1990) were gazetted and include specifications for Ultra Low Sulphur Diesel (ULSD) and colour change for the Automotive Diesel Oil. The introduction of ULSD not only has positive implications for motor vehicle efficiency, but also for improved air quality and could be seen as an important strategy in the pursuit of a low emission development path.

STI FINANCING

For the Financial Year 2013/2014, Government's budgetary allocation to the main STI and R&D Ministries, Departments and Agencies (MDAs) totalled $3 544.6 million, which represents a 4.9 per cent increase relative to the previous year (Table 4.1). Recurrent expenditure remained relatively unchanged, whereas Capital A declined by 4.0 per cent and Capital B increased by 48.6 per cent. As a proportion of the national budget, STI allocations declined by half, to 0.35 per cent.

Budgetary allocations for Research and Development (R&D) and e-learning projects under the Ministry of Science, Technology, Energy and Mining (MSTEM) were both increased, by 22.0 and 31.1 per cent respectively (see Table 4.1). Of the total R&D provision of $475.5 million, grants to the Scientific Research Council (SRC) approximately $399.5 million[7], was to assist with the building of local capabilities, human resource development and utilization and technological development of priority sectors. The Capital A provision for industrial development, foreign investment and export promotion activities under the Ministry of Industry, Investment & Commerce (MIIC) tripled to $113.6 million (see Table 4.1), largely to spur development of the creative and MSME industries, and support the establishment of a logistics hub and related infrastructure.

With an allocation of $611.4 million, energy conservation and management projects accounted for almost the entire Capital B budget, representing an almost two-fold increase over the 2012/2013 period. As in previous years, STI-related MDAs supplemented the budget allocations with revenue generation and grants from external funding partners.

STI CAPACITY BUILDING FOR DEVELOPMENT

Standards Development

The country continued on its path of creating a more competitive and enabling business environment to facilitate trade and economic growth. In this regard, the Bureau of Standards Jamaica (BSJ) provided support to various sectors to develop and adopt national standards for products and services. To that end, a total of 50 standards (41 for services and nine for products) were published; approximately one half of the service standards published during the reporting period was geared towards improving the ICT sector.

5 Discover Magazine, January/February 2014

6 Compacted and shaped serving of minced meat or meat alternatives

7 This figure was further revised to $373.0 million

TABLE 4.1
BUDGETARY ALLOCATION FOR SELECTED STI PROGRAMMES AND AGENCIES
$000

PROGRAMME	REVISED ESTIMATES 2012/13	ESTIMATES 2013/2014	% CHANGE 2013/2014 to 2012/2011
Ministry of Agriculture & Fisheries			
Research & Development	389 887	316 403	-18.8
Veterinary Services: Labarotary Services	86 328	97 403	12.8
Ministry of Science, Technology, Energy and Mining			
Research & Development	389 887	475 539	22.0
Technical & Economic Department (Energy Division)	28 579	33 191	16.1
Technology Administration	131 553	117 676	-10.5
Policy Formulation, Implementation and Monitoring	17 582	19 158	9.0
Central Information Technology Office	41 583	39 942	-4.0
Geological, Geo-technical and Regulatory Services[a]	156 506	165 915	6.0
Ministry of Industry, Investment & Commerce			
Food Storage and Prevention of Infestation	133 443	128 898	-3.4
Industrial Development, Foreign Investment and Export Promotion	828 950	800 920	-3.4
Protection of Intellectual Property Rights	69 797	69 415	-0.5
Research & Development			
SUBTOTAL RECURRENT	2 274 095	2 264 460	-0.4
CAPITAL A			
Ministry of Agriculture & Fisheries			
Research & Development	55 657	33 000	-40.7
Ministry of Science, Technology, Energy and Mining			
Energy Policy	93 086	0	-100.0
Geological, Geo-technical and Regulatory Services	38 804	16 014	-58.7
Central Information Technology Office			
E-learning Project	381 247	500 000	31.1
Universal Service Fund (formerly Universal Access Fund)[b]	86 473	0	-100.0
Ministry of Industry, Investment & Commerce			
Industrial Development, Foreign Investment and Export Promotion	35 000	113 630	224.7
Research & Development			
National ISO Quality Management System Certification	5 000	0	-100.0
SUBTOTAL CAPITAL A	690 267	662 644	-4.0
CAPITAL B			
Ministry of Agriculture & Fisheries			
Research & Development	33 200	0	-100.0
Ministry of Science, Technology, Energy and Mining			
Energy Conservation and Management	360 260	611 381	69.7
Establishment of GoVNet	21 000	6 072	-71.1
Ministry of Industry, Investment & Commerce			
Industrial Development, Foreign Investment and Export Promotion	1 044	0	-100.0
SUBTOTAL CAPITAL B	415 504	617 453	48.6
GRAND TOTAL	**3 379 866**	**3 544 557**	**4.9**

a- Includes Mining, Scientific and Technological activities
b-The USF is a statutory body under the Telecommunications Act, with a mandate to facilitate universal access to all Jamaican residents to easy and reliable high-speed internet services, irrespective of their economic circumstances or geographic location.

Source: Estimate of Expenditure ffor Year Ending March 2014, as passed

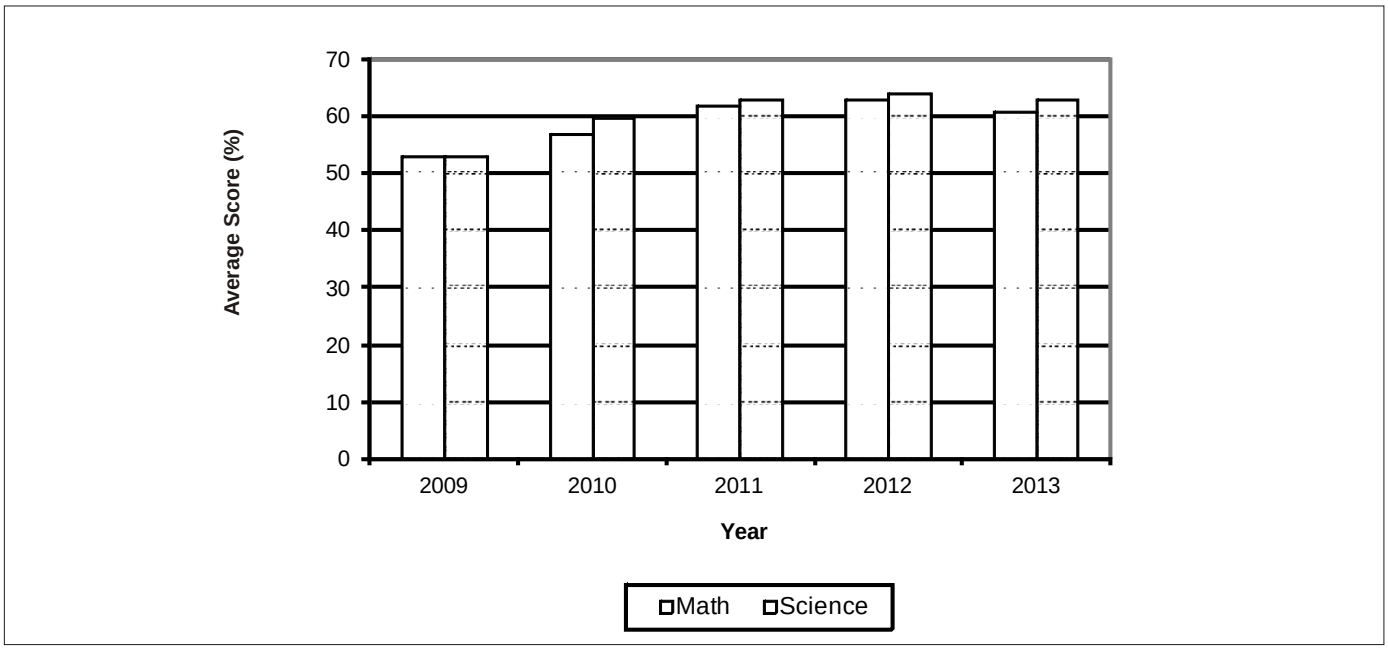

FIGURE 4A. PERFORMANCE OF JAMAICAN STUDENTS IN MATHEMATICS AND SCIENCE IN THE GSAT EXAMINATIONS, 2009–2013

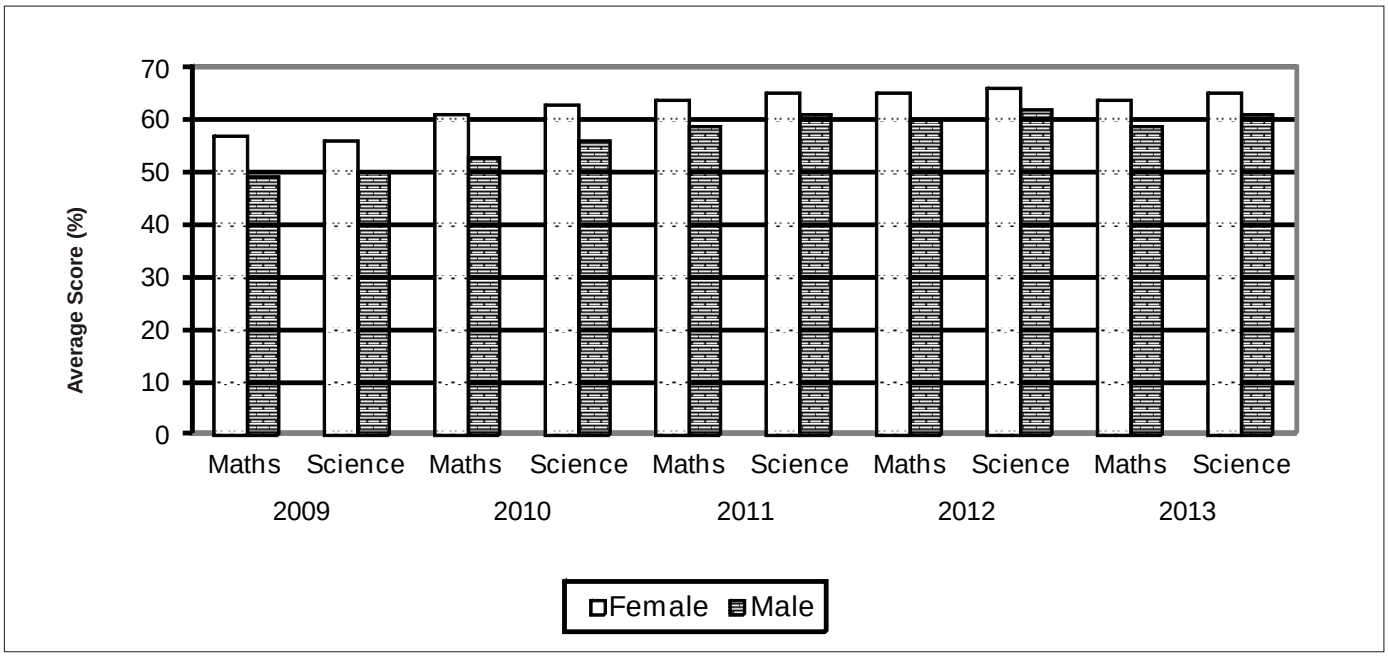

FIGURE 4B: PERFORMANCE OF JAMAICAN STUDENTS IN MATHEMATICS AND SCIENCE IN THE GSAT EXAMINATIONS BY SEX, 2009–2013

The National Certification Body of Jamaica (NCBJ) facilitated the certification of a number of companies to international environmental and safety standards such as ISO 9001, ISO 14000, ISO 22000, and HACCP[8]. The complement of companies certified to ISO 9001:2008[9] rose to 34 compared with 32 in 2012. However fewer companies were certified to ISO14001: 2004, falling to 11 from 13 in 2012.

As at the end of 2013, there were eight Conformity Assessments Bodies[10] (seven laboratories and one certification

8 Hazard Analysis Critical and Control Points (HACCP) is a food safety management system which can be implemented at any stage of the food production chain. It serves to identify and put in measures to control physical, biological chemical hazards which can cause the finished product to be unsafe.

9 This number is based on information available to the NCBJ and may be slightly less than the actual numbers certified.

10 Conformity Assessment Bodies (CABs) seek to assess compliance of a process, product, or service to a relevant technical standard. They included entities such as testing and calibration laboratories, certification bodies as well as inspection bodies.

TABLE 4.2
JAMAICAN CANDIDATES[a] SITTING SELECTED S&T SUBJECTS IN THE CSEC, MAY-JUNE EXAMINATIONS (GENERAL AND TECHNICAL PROFICIENCY LEVELS), 2009-2013

SUBJECTS	2009	2010	2011	2012	2013	% Change 2012/13
Biology	5 005	5 815	6 266	6 760	6 758	-0.03
Chemistry	5 057	5 978	6 642	6 906	7 048	2.1
Information Technology	13 086	12 291	13 789	14 321	14 083	-1.7
Mathematics	38 126	41 252	42 411	46 805	45 530	-2.7
Physics	4 818	5 596	5 692	5 991	6 054	1.1

a - Candidates include resits

Source: Caribbean Examinations Council (CXC) Office, Jamaica

body) accredited to ISO/IEC 17025:2005 or ISO 15189:2009. This included three food testing laboratories and one medical laboratory accredited by the Jamaica National Agency for Accreditation (JANAAC) during the year. The existence of accredited facilities support greater access to international markets[11] and can reduce costs to exporters by reducing or eliminating the need for retesting in importing countries.

STI Education

Future successes in STI require a continuous accretion of knowledge at the primary, secondary and tertiary levels of the education system; each level building on a strong foundation established in antecedent stages. The average scores obtained in the Grade Six Achievement Test (GSAT), is used as the performance marker for Science and Mathematics at the primary level.

With an average score of 63.0 per cent for Science and 61.0 per cent for Mathematics, perfomance in these two subject areas has remained relatively constant over the last three years (Figure 4A). Consitently over the last five years, females attained higher average scores than males in both subjects (Figure 4B).

Performance at the secondary level was assessed using the average scores obtained in Mathematics and core science and technology subjects at the May–June 2013 sitting of the Caribbean Secondary Education Certificate (CSEC) examinations. The number of student sittings in these subjects decreased by 1.6 per cent (1 310) compared with 2012, a reversal in the upward trend seen in the previous five-year period. The decline was more pronounced for Mathematics, which decreased by 2.7 per cent relative to 2012 (Table 4.2).

An increase in the number of students attaining Grades 1-3[12] was reported for Biology (1.7 percentage points) and Chemistry (7.3 percentage points), whereas IT and Physics both showed a decline (Figure 4C). At 34.1 per cent, Mathematics continued to lag behind the other subjects, but recorded a 7.6 percentage point increase in candidates obtaining Grades 1–3.

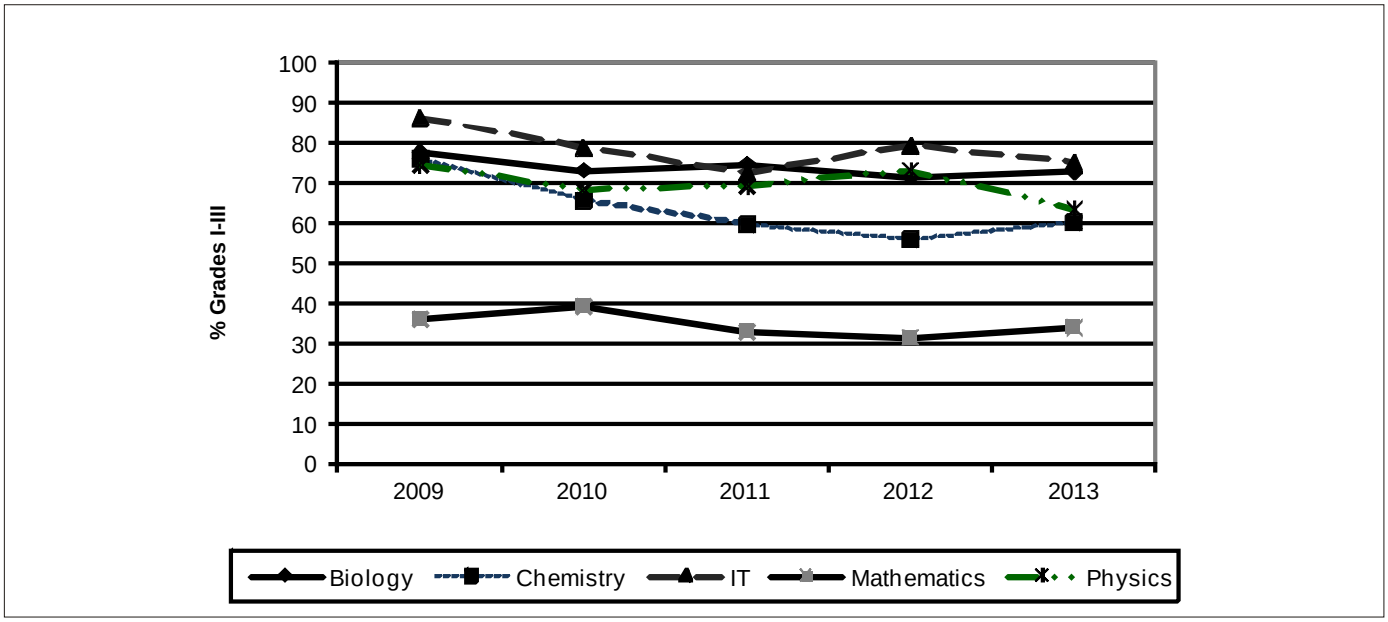

FIGURE 4C: PERFORMANCE OF JAMAICAN CANDIDATES IN SELECTED SCIENCE SUBJECTS IN THE CXC/CSEC MAY-JUNE EXAMINATIONS, 2009-2013

11 One of the requirements of the Food Safety Modernization Act, promulgated by the USA in 2011 requires that all food imports entering the US be tested by accredited institutions.

12 Grades 1-3 are required for matriculation for post-secondary education and the world of work.

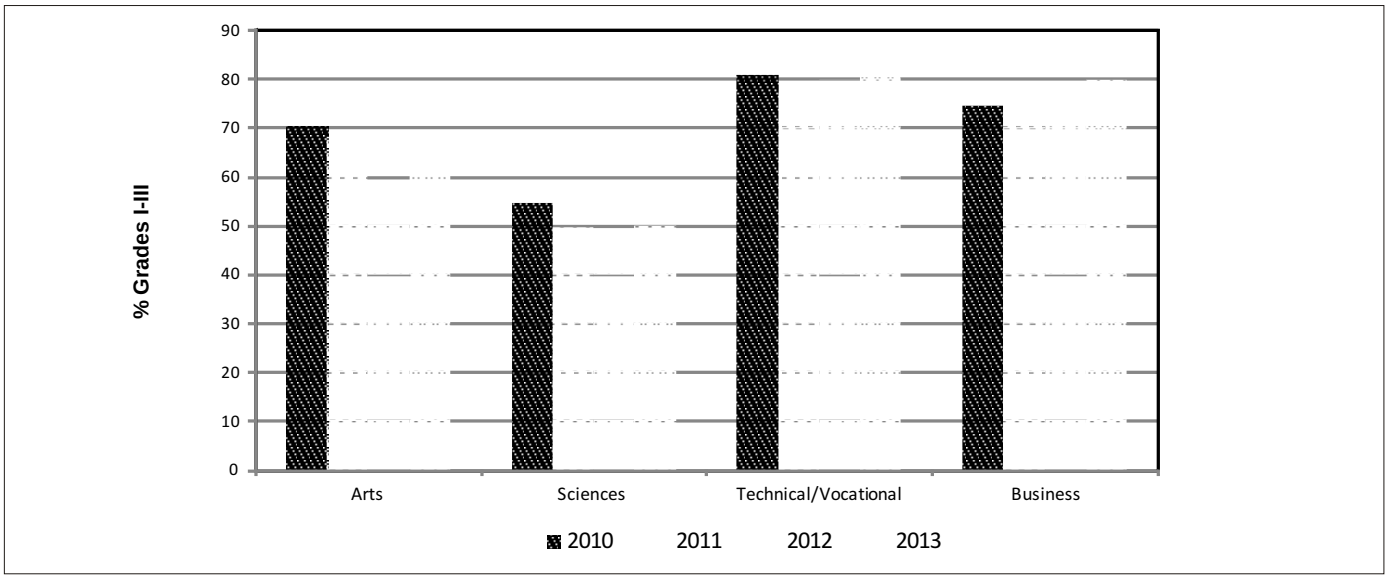

FIGURE 4D: COMPARISON OF PERFORMANCE OF JAMAICAN CANDIDATES BY SUBJECT CATEGORY IN THE CSEC EXAMINATIONS, 2010-2013

The Sciences continued to record the lowest percentage of candidates attaining Grades 1–3 compared with all other subject areas (Figure 4D). At 50.3 per cent, the average attainment rate for the Sciences in 2013 was on par with 2011 levels, increasing from 47.6 per cent in 2012. Recent e-learning initiatives are expected to boost student performance through access to information and new learning modalities.

At the tertiary level, there were expanded STI programme offerings available to students in the 2012/2013 academic year in response to market demand. The UWI (Mona) launched two undergraduate degrees, a BSc in Computer Systems Engineering and a BSc in Civil Engineering[13]. The UTech, on the other hand, launched a BSc degree in Mathematics and Education, and added MSc offerings in Mathematics Teaching, and Engineering (with the following specializations: Management, Agricultural, Chemical, Civil, Computer, Electrical, Industrial and Mechanical and Energy Management).

Enrolment in undergraduate degrees in the main STI faculties continued to trend upwards, with the UWI cohort growing by 4.6 per cent to 2 427, and UTech recording a 38.2 per cent increase to 619 (see chapter on Education). While UTech accounted for the greater proportion of students pursuing Engineering degrees at the undergraduate level (885), enrolment in higher Engineering degrees was low (7). For UWI, the number of Engineering students remained relatively unchanged for both undergraduate and higher degrees, at 33 and 50, respectively. Expanded Engineering programmes at both UWI and UTech are expected to positively impact both undergraduate and graduate enrolment. The number of students pursuing higher STI degrees remained comparatively low at UWI, with 364 students enrolled in graduate courses.

STI Training and Popularization

A variety of initiatives to promote and popularize science and technology were undertaken islandwide during 2013. These included workshops, seminars, conferences, symposiums, and the SRC-led month of science and technology events (Box 4.2). A common theme across the proceedings was fostering the development of industries to facilitate national growth and development through the application of STI.

BOX 4.2. Highlights from the SRC's Science and Technology Month Celebrations

The theme for the year's celebration was ***"Science and Technology – the Gateway to Economic Restoration"*** and key activities for the month of November included:

- Workshops and presentations on topics such as the use of social media for information exchange; food and juice processing; development of personal care products; and wastewater technologies
- Science tours for students from 24 high schools, islandwide roving exhibitions and quiz competitions
- Launch of the Caribbean Climate Innovation Center's (CCIC) Proof of Concept (POC) Competition. The CCIC will provide grant funding of between US$25 000 and US$50 000 to assist with the transfer of technology and commercialization of new products for climate change adaptation and mitigation.

The month's celebration culminated in an "Opportunity Fair" held on November 28th under the sub-theme ***"Limitless possibilities...Infinite opportunities"*** showcasing business opportunities, technologies and support services.

The enhancement of science and technology through capacity building was facilitated by a number of training opportunities provided by STI-related agencies and institutions. Topics included pest management, post-harvest techniques, tissue culture, food safety, research methods, evidence-based medicine, waste management technologies, radiation safety as well as requirements for compliance leading to the adoption of product and service standards (Table 4.3).

Research and Development

The total number of persons engaged in R&D per million population is an important indicator of development as it demonstrates the capacity to create new knowledge, products, processes, methods and systems, which can drive economic

13 UWI (Mona) has adopted the BSc in Civil Engineering traditionally offered by the UWI St. Augustine Campus

TABLE 4.3
SELECTED STI CAPACITY BUILDING ACTIVITIES-TRAINING, 2013

Area	No. of Persons Trained	Responsible Agency
Agricultural health topics	20	MOAF- R&D
Biogas Technology	12	SRC
Food processing & preservation	183	SRC
Product development (personal care)	14	SRC
Standards and certification (quality & laboratory management, environment & energy management, food safety, occupational safety & health, etc.)	761	BSJ
Accreditation	286	JANAAC

Source: Compiled from data presented by agencies

and social transformation. Improvement in this indicator is hinged on the availability of effective funding mechanisms. As data to assess the indicator is not readily available, a sample (17) of government and academic institutions was surveyed to get an indication of the number of professionals engaged full time in R&D (Table 4.4). Data from the respondents showed a total of 107 persons engaged in STI research, with a relatively even gender distribution. Based on the categories reporting, research related to agricultural safety, food security, sustainable production, environmental health and diversification of energy sources (to include a greater proportion of renewables), continued to be strategic national priorities.

Agriculture

Agricultural research undertaken in 2013 was directed towards the evaluation and development of economic production and productivity models for livestock, field and horticultural crops. Areas of focus included nutrition and husbandry practices; pest and disease management; and preservation and improvement of crop and livestock genetic resources. Select research undertaken by the Ministry of Agriculture and Fisheries Bodles Research Station during the period included:

- evaluation of yields and quality of three lettuce varieties, Conquistador (romaine), Sahara (iceberg) and Aviram (iceberg), grown under greenhouse conditions and fertigated with organic versus conventional inorganic fertilizers. The results of the study indicated that the organic fertilizer used was not feasible for greenhouse lettuce production using inert planting material. Further evaluation in open field is planned.
- assessing the efficacy of increasing fertigation events at critical periods during the day to mitigate tip burn in romaine and iceberg (Sahara) lettuce varieties. It was found that this strategy may be more effective for reducing tip burn in the iceberg variety, especially during the winter months.
- preparation of a monitoring and forecasting tool to guide pest and disease management in high and medium technology greenhouse production. Two Integrated Pest Management[14] (IPM) trials for tomato and sweet pepper were established targeting broadmite on sweet pepper, whiteflies on tomato and powdery mildew on both crops. Assessment of the efficacy of *Beauvaria bassiana*, a biological control agent, to control whiteflies on tomato continued.
- employing IPM techniques to combat citrus greening disease caused by the bacterium *Candidatus Liberibacter asiaticuse*, and the Beet Army Worm (*Spodoptera exigua*) on scallion.
- monitoring of selected farms in Clarendon and St. Catherine was conducted to collect data on the Asian citrus psyllid vector population. Interventions to manage the citrus psyllid vector such as the ongoing release of the parasitoid[15] *Tamarixia radiata*, has greatly reduced secondary movement of the vector within test plots. Improved appearance of citrus greening was reported in response to the nutritional management programme.
- assessment of the impact of different types of fertilizer programmes, ginger source material (ginger tissue culture plantlets versus ginger rhizomes) and coir planting medium to provide information on cost effective nursery production. The findings suggest higher yields when rhizomes are used as the source material and a fertigation regimen utilized to supply nutrients. In terms of economic best practices for improving field grown ginger and turmeric yields, preliminary results showed that pre-plant herbicide use can significantly reduce weed growth and potentially reduce labour costs. Ongoing work is being done for field production of ginger using third generation F3 tissue culture plants.
- germplasm conservation, characterization and evaluation activities for sweet potato, cassava and pineapple. Additions were made to the local cassava germplasm under the Jamaica Columbian Technical Cooperation with 11 cassava varieties received from the International Centre for Tropical Agriculture (CIAT) as tissue culture plantlets. After hardening and multiplication at the Post Entry Quarantine Facility, plants were distributed to the Bodles, Orange River and Montpelier Research Stations for grow-out and further evaluation.

Efforts were intensified to improve livestock genetic resources and animal nutrition and husbandry practices. These

14 Integrated Pest Management (IPM) may be described as the integrative use of all available pest control methods to control target pests

15 Parasitoids are insects that feed on the body of another insect or arthropod during the larval stage of their life cycle. They usually only attack a particular life stage of one or several related species and can be incorporated into an IPM programme as a form of biological control.

TABLE 4.4
FULL TIME STI RESEARCHERS FOR SELECT AGENCIES AND INSTITUTIONS, 2013

Entity	Number of Researchers Male	Female
GOJ Agencies		
Bodles Research Station (MOAF)	23	27
Food Storage and Prevention of Infesation Division (MIIC)	5	8
SRC (MSTEM)	8	15
Higher Education & Specialized Institutions		
ICENS	10	3
Northern Caribbean University ? College of Natural and Applied Sciences	6	2
Sub-total	52	55
Total Number of Researchers	**107**	

Source: Compiled from data presented by agencies

included importation of improved genetics of goat and sheep for breeding; expansion of the Ministry's government nucleus herds; distribution to farmers; and production of meat and other value added products. Preliminary findings from two nutrition studies indicated that cassava could be used up to a rate of 30.0 per cent in the diet of growing pigs without impairing growth performance compared with the use of commercial concentrates. A positive relationship on yield and nutritive value was noted when corn and cow peas, used for animal feeds, were intercropped.

The Sugar Industry Research Institute (SIRI) implemented strategies to control the Orange Rust Disease, which remained largely confined to the upland basin of St Thomas-Ye-Vale in St Catherine. Activities involved rapid removal of the most susceptible varieties and a four cycle application of commercial fungicides applied at three week intervals. The outbreak was satisfactorily contained, with only one variety, BJ7504, continuing to show symptoms (but at reduced levels) when grown on acid soils.

Other research activities included:

– stage one variety screening trial to expose many of the sugar cane clones used in breeding to intense inoculum of orange rust. The work was executed by SIRI, in conjunction with the Cane Breeding Station, as a preventive action against the disease, which has only recently entered the Caribbean region. Since there was no previous exposure of the breeding stock to this disease, it was not possible to select for resistant clones. The results of the trial indicated that the various clones showed little susceptibility to the disease.

– "SpectraCane" technology was introduced through a grant from the European Union. This device uses near infra-red (NIR) technology to scan macerated cane tissue for its various components as a sample passes on a conveyor belt. The speed at which such analyses are conducted makes it possible to examine thousands of potential new varieties at an early stage of the multi-year selection process. Of immediate importance is the equipment's ability to determine fibre content. With sugar cane increasingly recognized as a source of renewable energy, in selecting new varieties for future production, greater emphasis is being placed on fibre content which is important in electricity co-generation.

– method development and validation for the determination of dextran content by NIR Polarimetry, which was coordinated by SIRI and sugar laboratories in Belize and Guyana. Sugar containing dextran above a certain threshold obtains lower prices on the export market.

– the final phase of the project "*Regulating phosphorus in sugarcane to decrease production cost and protect fresh water resources in ACP countries"* was ongoing. This study utilizes rainfall simulation at varying intensities, on varied slopes and soil types to measure soil and phosphorus runoff, which can in turn, pollute fresh water ecosystems. Information from this project will assist farmers in managing the use of phosphorus as a fertilizer and lead to potential savings from a reduction in its use.

In the Banana industry, work continued to improve methods of planting and cultivation of bananas; control and eliminate diseases; and develop fruits wholly and partially immune to disease. The Banana Board led in the following:

– management of the Moko disease, which involved surveillance and monitoring of farms for disease outbreak, killing of infected banana mats and neighbouring (buffer) plants; training farmers and engaging the communities in finding solutions. During the review period, disease surveillance was carried out in St Mary and St James. Some 24 farms were investigated for Moko disease; 2 in St James were found to be infected. After laboratory confirmations, a total of 225 mats[16] were eliminated, and the target of restricting spread of the disease to other parishes was achieved.

– monitoring of black Sigatoka disease resistance to select fungicides continued. During the period, 54 leaf samples were analyzed from farms in Portland, St. Mary, St. Thomas, St. James and St. Ann, exceeding the target of 45 samples for the year. No cases of resistance were found. Control of the Sigatoka disease with bunch stalk extract (lixiviate) and a new environmentally friendly commercial product was demonstrated for transfer of the technology to famers. There were acceptable levels of control and no observed difference in

16 Mats consist of mother plant and suckers

disease levels between the commercial product and the stalk extract.

– reduction of the borer weevil population using pheromone traps. Some 18 farms adapted the new technology with 102 traps located across the parishes of Portland, St. Thomas and St. James.

– distribution of the new FHIA varieties in Portland, St Mary, Hanover and St Catherine. To date, 8 038 seedlings of the new varieties have been multiplied and distributed to 322 growers. Support was also received from the SRC to initiate and multiply three varieties of banana (FHIA 17, 20 and 25)

– promotion of the value chain approach to build competitiveness in the industry. Accordingly, the Banana Board provided technical support to entrepreneurs through the inspection and auditing of 20 ripening and nine chips production facilities, up from the 11 ripening and 3 chip facilities, respectively, in the previous year.

Energy

Energy efficiency and conservation has been identified as a potential growth sector; one which can create opportunities for new business and investments. Implementation of the National Energy Action Plan, which is critical to achieving this vision, included the launch and operationalization of the National Energy Information Clearing House (NEICH) and signing of an MOU between the Ministry of Water, Land, Environment and Climate Change (MWLECC), MSTEM and the United States Agency for International Development, on Enhancing Capacity for Low Emissions Development Strategies (EC-LEDS). Arising from the 2nd Meeting of the Energy Ministers of the Community of Latin America and Caribbean States (CELAC), the *Declaration of Montego Bay* and *Montego Bay Plan of Action* were agreed, to promote a unified approach to matters relating to regional energy security and integration.

As part of the public sector-led efforts towards promoting energy efficiency and conservation, progress was made in the implementation of the Public Sector Energy Efficiency and Conservation Programme (EECP), spearheaded by MSTEM. Some positive results were generated from activities such as installation of solar control film and cool roof solutions at public sector facilities. The NHT and Jamaica House both reported reductions in energy consumption of 61 719kWh and 11 917kWh respectively, for the period July 2012 to July 2013, compared with the previous year. A *Draft Energy Communication and Public Education Programme Strategy* was also crafted to create awareness and stimulate the wide-scale adoption of energy efficiency and conservation practices.

Renewables are expected to play an important role in the transformation towards a low carbon sector and expanding its contribution is prioritized under the Medium Term Socio-Economic Policy Framework (MTF) 2012-2105. A Sustainable Energy Roadmap for Jamaica was developed under the *Pathways to an Affordable, Reliable, Low-Emission Electricity System* initiative, executed by the Worldwatch Institute, with support from the German Federal Ministry for the Environment, Nature Conservation and Nuclear Safety. MSTEM was the local counterpart for this study which examined the "real costs" — social, economic, and environmental— of the country's dependence on the importation of fossil fuels, whilst proposing alternative scenarios for future energy development. The study concluded that Jamaica has strong renewable energy potential, particularly for solar photovoltaic (PV) generation. Domestic solar resources were found to be strong, with average Global Horizontal Irradiance (GHI) – the measure used to determine potential for solar PV development – ranging from 5 to 7 kilowatt-hours per square meter per day (kWh/m2/day) throughout most of the country. These results compare favourably with Germany which has nearly half of the world's installed solar PV capacity, with an average GHI of 2.9 $kWh/m^2/day$. Significant wind and biomass energy potential were also noted. The study also showed that by 2030, renewable energy can reliably meet more than 90 per cent of Jamaica's electricity demand while lowering energy costs to consumers with the necessary strengthening of the infrastructure.

The assessment of potential sites for renewable energy development was carried out under the IDB-financed *Wind and Solar Development Programme*, wherein at least 20 sites across the island were evaluated for potential development. Wind monitoring equipment was also installed under the *Wind Power Irrigation Project*, being executed through the National Irrigation Commission (NIC), with support from MSTEM. Monthly collection of wind assessment data was facilitated.

Work advanced on biodiesel as a renewable energy source with the MOAF continuing its third year of collaboration with Petroleum Corporation of Jamaica's (PCJ) Centre of Excellence for Sustainable Energy Developments (CESED), to evaluate Castor Bean and Jatropha as potential sources of biodiesel. The primary objectives of this initiative are to build capacity as it relates to agronomic practices and set parameters for production as well as to provide preliminary data on seed and oil yields.

Private sector buy-in and investment is recognized as a critical success factor in the bid to create energy solutions and promote a culture of energy conservation and efficiency. To that end, the Office of Utilities Regulation (OUR) selected three preferred bidders for the supply of 78MW of a proposed 115MW of renewable energy generating capacity, supplying a mix of solar and wind energy. Private sector-led efficiency and conservation initiatives included the launch of *eStores* and *SolarMill¨* generator by the Jamaica Public Service Company Limited (JPS), which is expected to benefit both residential and business consumers. These provide solutions such as energy conservation and efficiency devices and generation of electricity via a hybrid solar and wind system respectively. These strategies are in line with the nation's commitment to a sustainable energy approach, and are in keeping with the outcomes of the United Nations Conference on Sustainable Development (2012).

Health

Work advanced to optimize standards of agricultural and human health and food security. Under the *Mitigating the Threat of Invasive Alien Species in the Insular Caribbean (MTIASIC)* project, led by the UWI Discovery Bay Marine Laboratory and the National Environment and Planning Agency (NEPA), evaluation of dietary exposure to minerals, trace elements and heavy metals from the muscle tissue of the lionfish was completed. Mean values for calcium, copper, iron,

potassium, magnesium, manganese, selenium, sodium and zinc were used to estimate dietary intake. The percentage contributions to *provisional tolerable weekly intake*[17] for a 70 kg male and a 65 kg female were estimated for the toxic elements arsenic, cadmium, mercury and lead. The findings suggest that lionfish contribute modestly to mineral and trace element nutrition, without contributing significantly to dietary exposure of toxic elements.

ICENS carried out work in the spectro-chemical analysis of the speciation of cadmium on montmorillonite[18] (M) in the presence of soil microbial biomass. The results suggest that the presence of soil microbial biomass may impact the availability of cadmium. The development of a cellulose-based passive sampler to assess trace metals associated with the mobile organic matter and dissolved organic matter (DOM) fractions of soils, sediments and water in the Rio Cobre was also achieved. Investigation of the chemical reactivity, mobility, bio-availability and toxicity of trace metals in the local environment and consequent soil-plant-human interactions will inform best practices to mitigate potential risks to human and ecosystem health.

Assessments of indigenous species for nutritive and other properties, with possible commercial benefits, were also undertaken. The SRC partnered with the UWI Department of Basic Medical Sciences to carry out studies on anti-inflammatory compounds in local plants and evaluation of the toxicity of local teas. The organization also partnered with the College of Agriculture, Science and Education (CASE) to investigate the anti-oxidant properties of secondary metabolites isolated from fungi.

TECHNOLOGY USE AND TRANSFER

Support by Public STI Agencies

Public sector agencies were actively involved in the transfer of knowledge and technology to stakeholder groups and communities. The use of Geographical Information Systems (GIS) and related technologies, for example, continued across sectors such as agriculture and waste management (see Chapter on Sustainable Development). In the sugar industry, it was used to assist farmers with boundary surveys, and for the installation of irrigation and drainage systems. The National Solid Waste Management Authority (NSWMA) used GIS to create zonal maps for the Retirement Wasteshed, located in St. James and also employed GPS tracking of trucks.

The BSJ in collaboration with the Bamboo and Indigenous Materials Advisory Committee (BIMAC) spearheaded the *Bamboo Products Industry Project*. The project, which commenced in August 2011, seeks to develop and commercialize quality bamboo products. Some of the major deliverables during the period under review included the development of six prototypes (stylus for smart phones and tablet computers, charcoal, sawdust briquettes, charcoal briquettes, lumber, and spice blend bamboo charcoal capsules), and successful distribution of bamboo charcoal in the marketplace (jerk centres and supermarkets). Overseas interest was also generated in the project. Jamaica became the 38th member of the International Network for Bamboo and Rattan in 2012.

Under the UTech-led alternative energy project *The Application of Solar-Powered Polymer Electrolyte Membrane (PEM) Electrolysers for the Sustainable Production of Hydrogen Gas as Fuel for Domestic Cooking*, equipment was procured and the University's laboratory research facilities were upgraded. The BSJ facilitated the review of six international standards and three technical documents related to the project. Key areas of research under the project are: power characterization of the PV system; colourizing the hydrogen gas flame; gas storage media; and gas stove modifications.

The MSTEM partnered with the UTech Faculty of Engineering and Computing to develop the Energy Database and Management Information System, which is a web-based information system to capture, process, and use energy-related data to enhance planning and decision-making capabilities as well as provide energy stakeholders with real time data. Other ICT-driven service upgrades included the *Job Management Tracking System* and *Compliance Connect*, used by the BSJ to facilitate faster response times to customers and improved internal efficiencies

In the area of waste management the SRC hosted a public presentation titled *Cost Effective/ Environmentally Friendly Wastewater Systems Impacting the Bottom Line*. This event was organized as part of the Council's thrust to highlight the benefits of treatment systems and transfer wastewater technologies to the wider public. The presentation targeted industry players including manufacturers, engineers, environmentalists, agro-processors and representatives of the construction industry. The systems generate useful by-products such as biogas, treated wastewater and organic fertilizer and have potential benefits such as reductions in energy costs and use of potable water for irrigation purposes.

E-Readiness[19]

Jamaica, with a score of 3.74, slipped 11 places to 85 (of 144 countries measured) in the Global Information Technology report, Networked Readiness Index[20] (NRI), down from 74 in 2012, with a score of 3.86 (Table 4.5). Ranking on the latest ICT Development Index (IDI) 2012, however, held steady at 93[21] (Table 4.6). Both indices track progress on ICT development, based on access, use, skills and impact. Indicators such as computer and internet access, broadband internet and mobile phone subscriptions, e-government services, availability of venture capital, and adult literacy are evaluated. In the NRI, the country scored slightly lower in the areas of individual usage (2.9)[22], government usage (3.8) and social impact (3.4), but marginally higher in the area of political and regulatory

17 The acceptable level of a contaminant (such as a toxic metal) that can be ingested on a weekly basis, as determined by the World Health Organization and the Food and Agriculture Organization.

18 Montmorillonite is a commonly found type of clay - results indicate that the order of metal-loading was M-microbial complex > microbial biomass > M

19 This section assesses the country's status on two international ICT indices and highlights major developments in the sector.

20 The Networked Readiness Index measures the preparedness of countries in using information and communications technologies to boost competitiveness and well-being.

21 Ranking for IDI 2011(which is reported on in 2012) was revised to 93 from 89

22 Sub-indices are scored on a scale of 1-7

TABLE 4.5
PERFORMANCE OF SELECTED COUNTRIES IN THE NETWORKED READINESS INDEX, 2008/09-2012/13

Region/Country	2008/09	2009/10	2010/11	2011/12	2012/2013
Asia					
Hong Kong	12	8	12	13	14
Japan	17	21	19	18	21
Singapore	4	2	2	2	2
Europe					
Denmark	1	3	7	4	8
Finland	6	6	3	3	1
Iceland	7	12	16	15	17
Sweden	2	1	1	1	3
Latin America and the Caribbean					
Brazil	59	61	56	65	60
Chile	39	40	39	39	34
Barbados	36	35	38	35	39
Jamaica	53	66	73	74	85
Trinidad & Tobago	81	79	63	60	72
Dominican Republic	75	74	79	87	90
North America					
Canada	10	7	8	9	12
United States	3	5	5	8	9
Africa					
Tunisia	38	39	35	50	n/r
South Africa	52	62	61	72	70
Total number of countries	**134**	**133**	**138**	**142**	**144**

n/r - not reported

Source: Global Information and Technology report 2013, World Economic Forum and INSEAD

environment (3.9) compared with the average scores of other countries in the "Upper-middle-income group[23].

The ability of ICT to drive competitiveness and development is dependent on access and use by all segments of the society (individuals, businesses and government). According to preliminary data from the *Jamaica Survey of Living Conditions 2012*, about one-third (32.5 per cent) of households owned working computers, a growth of 6.5 percentage points relative to 2010. Access to the internet grew by 5.7 percentage points to 22.6 per cent of households. Asymmetric Digital Subscriber Line (ADSL) at 50.9 per cent, continued to account for the largest proportion of internet connections, however, a rising percentage of households reported use of wireless broadband (31.3 per cent).

Access to the internet was also facilitated at the community level, with support from the Universal Service Fund (USF), through the establishment of CAPs in strategic locations such as schools, public libraries, post offices and other institutions across the island. The number of CAPs stood at 407 as at the end of 2013(see chapter on Transport, Storage and Communication). Increased deployment of broadband networks facilitates growth of the ICT sector through enhanced access to information and expanded opportunities for entrepreneurship and service provision, and is found to correlate with an increase in GDP[24].

A number of e-Government services were rolled out to improve accessibility, reduce processing cost and facilitate greater interface with users. Among those entities with new or improved offerings were the Tax Administration Jamaica, Companies Office of Jamaica, and the Accountant General's Department (AGD). Among the services launched were the:

- **One Stop Business Registration 'Super Form' (BRF1)**, which allows those incorporating companies or registering business names to make a single application for their Taxpayer Registration Numbers (TRN), General Consumption Tax (GCT), National Insurance Scheme (NIS), register with the NHT, and complete the Articles of Incorporation required for company registration
- **National Security Interests in Personal Property Registry for Jamaica (Collateral Registry),** which allows the registering of notices of security interests in personal property (collateral) and facilitates search for notices of other existing security interests
- **Central Treasury Management System (CTMS)**, administered by the AGD, which allows a single agency to assume the full responsibility for the handling of the Government's cash.

23 The income group is defined by the World Bank and reflects the situation as of November 2012.

24 Recent research by the World Bank found that for every 10 percentage-point increase in the penetration of broadband services, developing countries can see an increase in economic growth of 1.3 percentage points.

TABLE 4.6
PERFORMANCE OF SELECTED COUNTRIES IN THE ICT DEVELOPMENT INDEX 2010–2012a

Region/Country	2010	2011	2012
Korea (Rep)	1	1	1
Japan	8	8	12
Singapore	10	14[r]	15
China	79	79[r]	78
Europe			
Sweden	2	2	2
Iceland	4	4	3
Denmark	3	3	4
United Kingdom	14	11[r]	8
Latin America and the Caribbean			
Barbados	32	36[r]	29
Antigua and Barbuda	44	44[r]	49
Chile	58	52[r]	51
Trinidad and Tobago	60	63[r]	66
Brazil	67	62[r]	62
Jamaica	84	93[r]	93
North America			
United States	16	17[r]	16
Canada	20	20[r]	20
Africa			
Tunisia	85	92[r]	91
South Africa	90	85[r]	84
Kenya	114	116[r]	116
Total number of countries in rank	152	157[r]	157

a -Report represents the latest available data
r - Revised

Source: Measuring the Information Society Report, 2013
- International Telecommunications Union

– **Employee Census System (E-Census)**, which is a web-based application used to capture detailed information on public sector employees. This portal enables quick and efficient updating of employee information.

Teledensity

Tele-density, used to measure the number of telephone connections per 100 population, was also tracked, and rose to 112.1/100 population[25] (Table 4.7), up from 108.2/100[26] population in the corresponding 2012 period. Consistent with the trends seen in the last five years, mobile penetration continued to outpace that of fixed line at a ratio of 11:1. While fixed line penetration remained relatively unchanged, a rebound in the number of mobile subscriptions was observed, increasing by 4.7 percentage points to a 103.1 per cent penetration rate. The lowering of call rates, greater connectivity and the proliferation of smartphones and may be factors influencing the trend in mobile subscriptions.

ABM Density

The availability of Automated Banking Machines (ABMs) provides for convenient access to a suite of financial services; business efficiency; reduced operational and transactional costs; and higher levels of customer satisfaction. The total number of ABMs increased to 697. This 8.2 per cent increase relative to 2012 (Table 4.8), yielded a ratio of 25.6/100 000 population (or 1 per 3 900), up from 23.8/100 000[27] population (or 1 per 4 202) in 2012. Despite this improvement, Jamaica is still expected to lag behind the world and regional (Latin American and the Caribbean) averages, which were 31.3/100 000 population and 30.1/100 000 population in 2011[28]. The parishes of St. Andrew, St. Catherine and St. James continued to account for the largest proportion of installed machines (see Table 4.8), corresponding to higher population densities[29] and commercial activity compared with the remaining parishes.

25 A preliminary mid- year population figure of 2 714 700 was used to calculate the teledensity.
26 Figure revised from 108.3/100 population
27 ESSJ 2012
28 Based on the latest available data - The World Bank, 2013 States and Markets, World Development Indicators: Financial Access http://wdi.worldbank.org/table/5.5
29 Approximately 50.8 per cent of the population is distributed among these three parishes - ESSJ 2012

TABLE 4.7
TELE-DENSITY IN JAMAICA, 2009-2013

Year	Population	Landlines	Mobile	Total	% Fixed Line Penetration	% Mobile Penetration
2009	2 698 800	302 451	2 956 061	3 258 512	11.2	109.5
2010	2 705 800	284 285	3 181 995[r]	3 466 280	10.5	117.6
2011	2 704 100	270 068[r]	2 945 395[r]	3 215 463[r]	10.0[r]	108.9[r]
2012[r]	2 711 500	253 143	2 714 938	2 968 081	9.3	100.1
2013[p]	2 714 700	247 879	2 795 673	3 043 552	9.1	103.1

p - preliminary figures as at June 2013
r - revised to reflect end of year figures

Source: Office of Utilities Regulations and STATIN

TABLE 4.8
CUMULATIVE NUMBER OF AUTOMATED BANKING MACHINES BY PARISH, 2009-2013

Parish	2009	2010	2011	2012	2013	% of Total
St. Andrew	181	191	202	214	227	**32.6**
St. Catherine	81	82	85	95	103	**14.8**
St. James	55	59	66	72	77	**11**
St. Ann	42	43	48	51	54	**7.7**
Westmoreland	24	25	28	30	33	**4.7**
Manchester	27	29	33	34	37	**5.3**
Kingston	20	21	23	25	38	**5.5**
Clarendon	25	25	28	29	30	**4.3**
St. Elizabeth	22	22	26	27	28	**4**
St. Mary	14	15	18	20	21	**3**
Hanover	13	15	15	15	15	**2.2**
Portland	8	8	9	10	10	**1.4**
Trelawny	7	7	10	10	12	**1.7**
St. Thomas	9	10	11	12	12	**1.7**
Total	**528**	**552**	**602**	**644**	**697**	**100**

Source: JETS Limited

E-learning

The GOJ delivered on some of its plans to promote and facilitate technology enabled learning by means of computer and web-based learning, virtual classrooms, audio-visual and other ICT tools. Bids were received for the procurement of 30 000 tablet computers for schools under the pilot phase of the Government's School Tablet Computer Programme. This is expected to benefit at least 37 learning institutions, including Infant Departments, Primary, All Age and Junior High schools, High schools, as well as special education teacher training institutions. Following a review of the pilot, the programme will be expanded island-wide with an anticipated reach of 600 000 students and teachers. At the tertiary level, UWI Mona extended the E-textbook programme to include not only Medical Science students, but also 150 students pursuing the Master of Business Administration.

The Technology Enrichment Programme (TEP), an initiative of e-Ljam reported improved performance in numeracy and literacy skills among the 30 targeted high schools. The schools were selected for the programme based on recent GSAT and CSEC results as well as the Grade 9 Diagnostic Test. Sixty Grades 7 and 8 students were selected for the programme by each participating school including, Denham Town, Greater Portmore, Yallahs, Inswood, Clan Carthy, Cumberland, Haile Selassie, Kingston, Robert Lightbourne, Tivoli Gardens and Paul Bogle High Schools.

INNOVATION

Innovation is recognized as an important driver of economic growth, as the introduction of new ideas can generate a groundswell of new goods and services that can stimulate job creation and enhance competitiveness. Patent and publications counts are useful benchmarks for innovative output. The Jamaica Intellectual Property Office (JIPO) recorded an 11.2 per cent increase to 119 in the number of patent applications received for both products and processes (Table 4.9). Resident applications declined by 3 to 22 and accounted for 18.5 per cent of filings. There was a 75.0 per cent increase in the number of

TABLE 4.9
PATENTS FILED AND GRANTED IN JAMAICA FOR SELECTED COUNTRIES, 2009-2013

Country	Applications	Granted	Applications	Granted	Applications	Granted	Applications	Granted	Applications	Granted
	2009		2010		2011		2012		2013	
Jamaica	16	3	13	2	20	5	25	0	22	4
United States	54	8	33	20	16	11	22	7	31	11
Canada	2	2	2	0	4	0	1	0	2	1
Germany	20	3	17	5	17	7	24	3	35	1
England	0	11	3	7	3	3	6	6	1	8
Other	34	23	87	4	53	22	29	4	28	10
Total	**126**	**50**	**155**	**38**	**113**	**48**	**107**	**20**	**119**	**35**

Source: Jamaica Intellectual Property Office

TABLE 4.10
PERFORMANCE OF SELECTED COUNTRIES IN THE GLOBAL INNOVATION INDEX, 2009-2013

Region/Country	2009	2010	2011	2012	2013
			Rank		
Asia					
China	37	43	29	34	35
India	41	56	62	64	66
Singapore	5	7	3	3	8
Republic of Korea	6	20	16	21	18
Europe					
Sweden	3	2	2	2	2
Switzerland	7	4	1	1	1
Finland	13	6	5	4	6
United Kingdom	4	14	10	5	3
Latin America and the Caribbean					
Barbados	50	68	47	58	47
Brazil	39	42	38	39	64
Chile	39	42	38	39	46
Jamaica	73	70	92	91	82
Trinidad & Tobago	65	55	72	81	81
North America					
Canada	11	12	8	12	11
United States of America	5	11	7	10	5
Africa					
Nigeria	70	96	96	123	120
South Africa	43	51	59	54	58
Tunisia	46	62	66	59	70
Total number of countries in ranking	**130**	**132**	**125**	**141**	**142**

Source: INSEAD, World Intellectual Property Office and Cornell University

patents granted[30] with domestic patents accounting for 11.4 per cent. Local filings translated to approximately 8.1 patents/million population for 2013. Almost two-thirds of all patents granted during the period were for pharmaceuticals applications.

Research publications reflect contributions to the body of knowledge and are an indication of R&D output. Over the five year period 2009 to 2013, the number of local publications[31] increased by 21.1 per cent to 425 compared with the period 2004 to 2008. Medical and allied fields accounted for 47.3 per cent (201) of papers published, followed by environmental science/ecology and geology at 4.5 per cent and 4.2 per cent respectively. The existence of the *West Indian Medical Journal*, an official peer-reviewed scientific journal published by the UWI Faculties of Medical Sciences, may be a contributing factor to the higher levels of health related publications. This Journal was cited[32] 51 times in 2012 and 223 times since 2002. The number of citations gives an indication of impact and influence of research carried out. For the period 2003 to 2013, Thomas Reuters Journal Citation Reports¨ ranked Jamaica 118 out of 145 countries, with a total of 1 829 papers and 11 509 citations (approximately 6.3 citations per paper).

The country climbed 9 spots to a ranking of 82 (of 142 countries measured) on the Global Innovation Index (GII) (Table 4.10). The GII measures five sub-indices of Innovation Input (Institutions, Human Capital and Research, Infrastructure, Market and Business Sophistication) and two sub-indices of Innovation Output (Scientific and Creative). With a score of 32.89[33], Jamaica ranked behind CARICOM countries Barbados at 40.48 and Trinidad and Tobago at 33.17. Jamaica scored highest in the sub-index of *Institutions (67.8)*, which examines the political, regulatory and business environment, and may be reflective of the strides taken in policy, legislative and business sector reform. The *Knowledge and Technology Outputs* (17.6) sub-index showed the lowest level of performance possibly reflecting low levels of investment in R&D and innovation. ICT technologies (21.5), access (39.6) and use (15.6) also had relatively low scores, which correlate with current levels of performance in the E-readiness indices.

OUTLOOK

The country's current path of utilization of ICT as a growth engine will continue with initiatives such as GovNet and other e-Government strategies to boost efficiency and effectiveness. On a wider scale, the continued expansion of broadband access is expected to stimulate new and enhanced business opportunities as well as investments to move towards becoming net producers of ICT innovations. This will become increasingly important with plans advancing for the establishment of a logistics hub and the opportunities which this development will present for local ICT sector. Strengthening the regulatory framework through data protection and cyber-crimes legislation will be an underpinning success factor in this regard. In terms of commerce, increased levels of standardization, certification and accreditation are expected to drive improvement in business efficiencies, service quality and greater trade facilitation.

Efforts to reduce the nation's dependence on fossil fuels, whilst reducing the country's carbon footprint, will be impacted in the near to medium-term, by a number of ongoing and proposed energy efficiency, conservation and energy diversification programmes and initiatives. Renewables such as wind, solar, hydro and biofuels will benefit from R&D currently being carried out in collaboration with private partners and academic institutions. Growing the sector through the attraction of private investment will also be a key focus in the near-term, requiring comprehensive review of regulations, tariff methodologies and incentive schemes. Additionally, continued implementation of the energy conservation and efficiency programmes for the public sector, is expected to yield further reductions in government's energy bill, and will be expanded to other target sectors such as tourism and transport.

In line with STI priorities outlined in the MTF, and recognizing the critical role of STI education in creating the required knowledge base, expertise and tools to grow the nation's economic strength, Science Technology Engineering and Mathematics (STEM) academies are to be established at the secondary school level as a strategic response on the part of the GOJ. This will be complemented by broadened programme offerings from higher learning institutions in response to market demand and e-learning initiatives across all educational levels.■

30 Application filed may not necessarily be granted in the same year.

31 Thomson Reuters Web of Science TM (formerly ISI Web of Knowledge) is a research platform for information in the sciences, social sciences, arts, and humanities and is used for the determination of publication counts.

32 Thomson Reuters Journal Citation Reports¨

33 GII Indices are scored from 0-100

CHAPTER 5

GROSS DOMESTIC PRODUCT

INTRODUCTION

Real Gross Domestic Product (GDP) for 2013 was $732 440.9 million, representing an increase of 0.2 per cent relative to 2012 (Figure 5A and Table 5.1). This out-turn followed a 0.5 per cent contraction during the preceding year. The economy's performance in 2013 resulted from respective increases of 0.4 per cent and 0.1 per cent in the Goods Producing and Services Industries. Within the Goods Producing Industry, increases were recorded by the Mining & Quarrying and the Construction industries. The Hotels & Restaurants and Finance & Insurance Services industries were the largest contributors to the positive out-turn of the Services Industry.

There were contrasting performances in output for the first half and second half of the year. During January-June 2013, real GDP contracted by 0.7 per cent, due partly to: unfavourable weather conditions, in particular the lagged impact of Hurricane Sandy[1] and drought conditions during January-April; business confidence being adversely impacted by protracted negotiations between the Government of Jamaica (GOJ) and the International Monetary Fund (IMF) for the establishment of a loan agreement under the Extended Fund Facility (EFF); and continued weak external conditions, which resulted in subdued demand for Jamaican goods and services. However, for July-December, the economy expanded by 1.1 per cent. This positive out-turn reflected the impact of improved weather conditions; a strengthening in the external demand for some Jamaican goods and services; and an expansion in construction-related activities.

Within the macroeconomic environment, confidence was impacted by an agreement between the GOJ and the IMF for the establishment of an Arrangement under the EFF. This agreement, which was contingent on the completion of four prior actions, aims to accomplish economic growth through a sustained reduction in debt levels. During the year, Jamaica successfully completed two quarterly reviews which resulted in total disbursements of US$272.2 million. The May 1, 2013 signing and subsequent successful completion of the two reviews positively impacted confidence resulting in: (i) resumption of financial support from the International Development Partners amounting to US$300 million; and (ii) a rating upgrade from the Standard and Poor's rating agency. However, there were bouts of investor uncertainty during the period stemming from the rapid depreciation of the Jamaican currency which was due to, among other factors, accumulation of Net International Reserves (NIR) consistent with programme target.

The Jamaican economy operated within a context of an expanding but still vulnerable global economy. Uncertainty resulted from fiscal and banking challenges in several Advanced Economies, while Emerging Market & Developing Countries recorded lower than anticipated out-turns. Despite these conditions, the overall increase in global output and trade translated into increased demand for some exports of Jamaican goods and services.

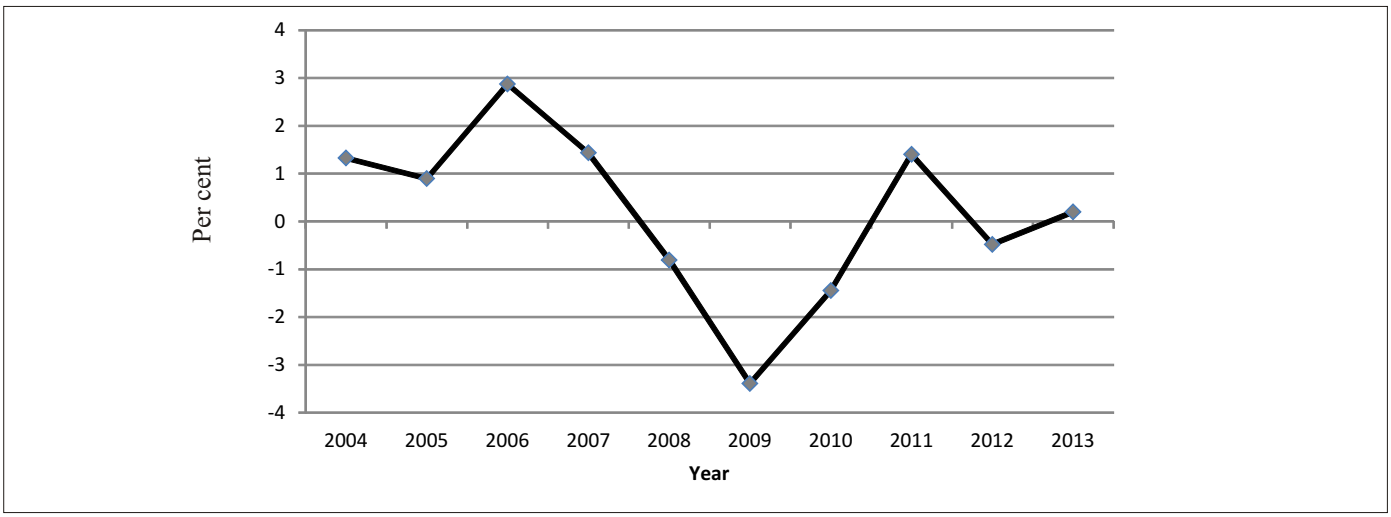

FIGURE 5A: CHANGE IN REAL GDP FOR THE JAMAICAN ECONOMY 2004-2013

1 Hurricane Sandy occurred in October 2012.

TABLE 5.1
VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES 2009 - 2013
($MILLION)

	2009	2010	2011	2012	2013
GOODS PRODUCING INDUSTRY	177 710.0	173 776.7	182 694.1	179 396.2	180 192.8
Agriculture, Forestry & Fishing	43 971.7	43 856.0	48 370.5	49 594.5	49 360.3
Mining & Quarrying	15 627.3	14 968.6	17 823.4	16 272.9	16 886.4
Manufacture	64 240.8	61 785.0	62 891.0	62 275.9	61 751.4
of which: Food, Beverages & Tobacco	33 619.4	33 327.2	34 268.7	34 465.9	34 445.3
Other Manufacturing	30 621.4	28 457.7	28 622.3	27 810.1	27 306.4
Construction	53 870.1	53 167.1	53 609.2	51 252.8	52 194.6
SERVICES INDUSTRY	593 827.7	582 497.6	582 434.9	581 310.7	581 845.3
Electricity & Water Supply	25 247.0	24 165.2	24 227.1	23 704.9	23 242.1
Transport, Storage & Communication	84 246.6	81 994.7	80 448.6	80 404.8	80 597.7
Wholesale & Retail Trade; Repair and Installation of Machinery	136 286.9	131 075.0	131 517.6	129 375.4	129 267.4
Finance & Insurance Services	84 085.7	81 228.3	81 010.0	81 712.6	82 140.3
Real Estate, Renting & Business Activities	79 995.6	79 184.5	78 887.3	78 610.7	78 850.8
Producers of Government Services	96 015.0	96 344.9	96 868.3	96 751.3	96 583.5
Hotels and Restaurants	37 578.1	38 841.0	39 618.5	40 322.6	40 695.8
Other Services	50 372.7	49 664.2	49 857.3	50 428.4	50 467.6
Less Financial Intermediation Services Indirectly Measured (FISIM)	36 540.5	31 914.9	30 594.3	29 699.5	29 597.1
TOTAL GDP AT BASIC PRICES	734 997.2	724 359.4	734 534.6	731 007.4	732 440.9

Source: Statistical Institute of Jamaica

ECONOMIC POLICY FRAMEWORK

The Executive Board of the IMF on May 1, 2013 approved a four-year Extended Arrangement (FY 2013/14-FY 2016/17) under the EFF for Jamaica. This loan agreement was valued at special drawing rights (SDR) 615.38 million (US$932.0 million) and was contingent on the implementation of four prior actions focused on fiscal adjustment and public debt management. These prior actions were:

Fiscal Adjustment

— A multi-year wage agreement with the unions representing at least 70.0 per cent of public sector workers – The Government and Trade Unions representing more than 80 per cent of public-sector workers signed a wage restraint agreement for the 2012-2015 contract period in March 2013, which limits public-sector wage increase to a maximum of 5.0 per cent. The most recent wage increase granted to public sector workers was for the period FY 2008/9 to FY 2009/10 indicating a five-year wage freeze.

— Adjustments in the granting of discretionary waivers – This involved: (i) ceasing the granting of discretionary waivers[2]; (ii) placing a cap on total waivers; and (iii) temporarily suspending the approval of new waivers and renewals until a new Omnibus Tax Incentive Regime is established.

Public Debt Management

— A debt exchange programme for domestic government bonds National Debt Exchange (NDX) – The NDX involved a par-to-par exchange of all existing domestic bonds (Jamaica dollar and US dollar denominated bonds[3]) with new bonds of lower coupon rates and longer maturity periods.

— Public Debt Law, which is aimed at consolidating various debt related legislations, thus strengthening the debt management process.

Macroeconomic policy was, therefore, guided by the Memorandum of Economic and Financial Policies (MEFP) FY 2013/14-FY 2016/17, which accompanied the Arrangement with the IMF and outlines the strategies and initiatives to be pursued during the four-year arrangement under the EFF. Of note, critical aspects of the GOJ's Growth Inducement Strategy agenda – which targets sustainable and broad-based economic growth over the medium-term – formed the basis for the GOJ's growth agenda in the MEFP, thereby facilitating broad alignment with the country's national development framework. The macroeconomic programme, as articulated in the MEFP, aims to engender macroeconomic stability and sustained economic growth, through a lower debt position and improved

2 This excludes those discretionary waivers granted to charitable organizations and for charitable purposes; those required to satisfy the GOJ's existing contractual obligations; and those explicitly exempted under the Technical Memorandum of Understanding.

3 The bonds targeted amounted to approximately $876 billion or 64.0 per cent of GDP. The NDX did not include bonds issued in foreign jurisdictions or held by non-residents.

competitiveness. Accordingly, the main pillars of the GOJ's economic programme are:

— time bound fiscal consolidation, supported by fundamental fiscal and monetary policy reforms aimed at creating a stable, predictable and resilient macroeconomic environment

— time bound structural and business environment reforms aimed at significantly strengthening Jamaica's external competitiveness, thus facilitating growth and employment

— debt management operations that place public debt on a sustainable downward path while simultaneously ensuring financial stability

— actions to improve price and non-price competitiveness

— improved social protection programmes aimed at alleviating the adverse impact of fiscal adjustment on the most vulnerable.

Time Bound Fiscal Consolidation

The Programme involves upfront fiscal consolidation initiatives (as undertaken as prior actions and established as benchmark targets for FY 2013/14), aimed at achieving a central government primary surplus of 7.5 per cent of GDP for the life of the programme. To further sustain fiscal tightening and entrench fiscal discipline, additional measures were outlined as quantitative targets or structural benchmarks throughout the life of the programme. Among these are: (i) the introduction of a five-year Public Sector Investment Programme, which is intended to guide capital investment of the GOJ through the use of rigorous criteria that ensures the alignment of projects to the country's developmental priorities; (ii) the adoption of a legally binding Fiscal Rule – to ensure a sustainable budget balance to achieve a reduction in public debt to no more than 60 per cent of GDP by the end of FY2025/26; and (iii) the passage of the Omnibus Tax Incentive Legislation.

Time Bound Structural Reforms

The objective of structural reform is to improve the business environment, particularly through: enhanced access to credit, especially for Medium Small and Micro Enterprises (MSMEs); labour market reform; and reducing the cost of doing business. To achieve this, specific initiatives include increased wholesale financing through the Development Bank of Jamaica; the establishment of a Port Community System to electronically integrate and streamline export and import procedures; streamlining the business registration process through the use of a multi-purpose registration instrument; and a review of labour market legislation.

Debt Management Operations

The GOJ is committed to reducing the public debt, through a sustained fiscal consolidation programme and through generating higher primary surpluses. These measures are to be supported by debt restructuring, improved debt management practices and the support of multilateral partners. It is expected that, combined, these measures will reduce the public debt/GDP ratio to 96.0 per cent by March 2020.

Actions to Improve Competitiveness

To improve productivity and foster international competitiveness, the GOJ aims to pursue various initiatives that can be broadly classified as follows:

— Improving the business environment, including fiscal and other initiatives to remove or reduce bureaucratic barriers and reduce the cost of doing business with the Government

— Addressing other barriers to private sector activity, including reducing the bottlenecks to major private sector investment, implementing energy sector initiatives to lower the cost thereby facilitating fuel source diversification, promoting the liberalization in delivery to ultimately reduce the cost of energy and ensuring targeted investment promotion and facilitation in specific industries such as logistics, agriculture, tourism and business process outsourcing

— Enhancing the quality of the public capital stock as part of a broader initiative to enhance the resilience of the built and natural environments

— Enhancing the quality of human capital through targeted skills training.

The EFF arrangement also has built in improvements in external competitiveness through exchange rate movements.

Improved Social Protection

Within the context of the programme, the government thought it prudent to ensure that the most vulnerable are protected. With this in mind, the social protection framework is to be enhanced, while promoting and facilitating empowerment and agency[4]. Social protection initiatives include: enhanced benefits for Programme of Advancement through Health and Education (PATH) beneficiaries; enhanced targeting of PATH beneficiaries through recertification to facilitate a smooth transition from the PATH programme; more efficient and effective education services; and improved health care.

The EFF programme is to be monitored through quarterly reviews of quantitative performance targets, indicative targets and structural benchmarks. The quantitative performance benchmarks focus on fiscal and monetary targets and for FY 2013/14 initially included:

— primary surplus of 7.5 per cent of GDP

— NIR stock of US$1 234.7 million.

The structural benchmarks were related to: institutional fiscal reform; tax reform; tax administration reform; reforms

4 Agency is the ability to recognize oneself as responsible for one's own empowerment and abilities in life. It is the ability to execute, initiate and control one's life and plays a pivotal role in self-awareness and self-esteem building.

related to the financial sector and growth enhancing structural reforms[5]. For FY 2013/14 these included:

— presenting a conceptual proposal for the design of a fiscal rule to the IMF, thereafter to revise relevant legislation for the adoption of the fiscal rule which is to be incorporated in the FY2014/15 budget

— tabling of a Charities Bill in the House of Representatives

— tabling of the Omnibus Tax Incentives Act to eliminate ministerial discretionary powers to grant or validate any tax relief and institute a transparent regime for limited tax incentives

— establishment and operation of a central collateral registry

— increasing the professional staff of large taxpayer offices to 120 staff members

Other commitments for FY 2013/14 included:

— tabling an Insolvency Act

— streamlining the Business Registration process through the use of a multi-use registration instrument

— the establishment of flexible work arrangements

— the establishment of HEART/NTA workforce colleges.

As at December 2013, Jamaica successfully completed two quarterly (April–June and July–September 2013) IMF assessments. This facilitated the combined disbursements of US$61.4 million for the two quarters and resulted in total disbursement of US$272.2 million.

Other Growth Inducing Initiatives

Probate Reform

Among the growth inducing initiatives undertaken throughout the year was probate reform. This was intended to allow for the handling of multi-generational estates[6] which are unable to be processed under current legislation. This will facilitate access to idle assets which may now be used to guarantee credit.

TABLE 5.2
YEAR OVER YEAR CHANGE OF VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES, 2009 - 2013
(PER CENT)

	2009	2010	2011	2012	2013	Average 2008-2012	Contribution to growth in 2013 Percentage pts
GOODS PRODUCING INDUSTRY	-9.5	-2.2	5.1	-1.8	0.4	-2.6	0.1
Agriculture, Forestry & Fishing	14.6	-0.3	10.3	2.5	-0.5	3.9	0.0
Mining & Quarrying	-50.4	-4.2	19.1	8.7	3.8	-12.8	0.1
Manufacture	-4.8	-3.8	1.8	-1.0	-0.8	-1.7	-0.1
of which: Food, Beverages & Tobacco	-4.4	-0.9	2.8	0.6	-0.1	-0.8	0.0
Other Manufacturing	-5.1	-7.1	0.6	-2.8	-1.8	-2.7	-0.1
Construction	-8.7	-1.3	0.8	-4.4	1.8	-4.3	0.1
SERVICES INDUSTRY	-0.9	-1.9	0.0	-0.2	0.1	-0.6	0.1
Electricity & Water Supply	2.2	-4.0	-1.9	-4.1	-2.0	-1.4	-0.1
Transport, Storage & Communication	-3.5	-2.7	-1.9	0.1	0.2	-2.2	0.0
Wholesale & Retail Trade; Repair and Installation of Machinery	-3.7	-3.8	0.3	-1.6	-0.1	-1.9	0.0
Finance & Insurance Services	3.0	-3.4	-0.3	0.9	0.5	0.6	0.1
Real Estate, Renting & Business Activities	-1.2	-1.0	-0.4	-0.4	0.3	-0.3	0.0
Producers of Government Services	-0.3	0.3	0.5	-0.1	-0.2	0.1	0.0
Hotels and Restaurants	2.0	3.4	2.0	1.8	0.9	2.3	0.1
Other Services	0.2	-1.4	0.4	1.1	0.1	0.2	0.0
Less Financial Intermediation Services Indirectly Measured (FISIM)	4.3	-12.7	-4.1	-2.9	-0.3	-3.7	0.0
TOTAL GDP AT BASIC PRICES	-3.4	-1.4	1.4	-0.5	0.2	-1.0	0.2

Discrepancies in the contribution to growth section is due to rounding.

Source: Statistical Institute of Jamaica

5 The growth enhancing structural reforms were incorporated during the third review.

6 Multi-generational estates are those where the first generation of beneficiaries have also died.

INDUSTRY PERFORMANCE

Agriculture, Forestry and Fishing

Real value added for the Agriculture, Forestry & Fishing industry contracted by 0.5 per cent compared with 2012. The industry's share of GDP was 6.7 per cent, 0.1 percentage point lower than the previous year. The Planning Institute of Jamaica's Agriculture Production Index revealed that the decline in Traditional Export Crops (down 17.3 per cent) and Animal Farming (down 1.1 per cent) outweighed increased output of Other Agricultural Crops (up 1.5 per cent).

The industry's out-turn reflected a 9.0 per cent decline in the first half of the year, as real value added increased by 9.5 per cent during the July–December 2013 period. The reduction in output reflected drought conditions and the lingering effects of Hurricane Sandy (October 2012). The GOJ's productivity programme, as well as the operation of seven agro-parks, positively impacted the industry.

Mining & Quarrying

Activities in the Mining & Quarrying industry increased, evidenced by a 3.8 per cent expansion in real value added. This was the largest growth registered by any industry and reflected a turnaround from the decline registered in 2012. The industry contributed 0.1 percentage point to overall GDP growth and accounted for 2.3 per cent of total GDP. This growth resulted from a 9.3 per cent improvement in the second half of the year, as there was a 1.5 per cent contraction during the first six months. The industry's performance stemmed from improvements in the Mining sub-industry which was associated with higher global aluminium demand, reflected in increased output at the JAMALCO and WINDALCO plants. This led to a 5.5 per cent increase in Alumina production to 1 854.9 tonnes, which outweighed the 1.7 per cent decline in Crude Bauxite to 4 688.3 tonnes.

Manufacture

Real value added for the Manufacture industry declined by 0.8 per cent, the second consecutive year of decline. Manufacture accounted for 8.4 per cent of GDP, falling from 8.5 per cent in 2012. The lower value added resulted from respective declines of 0.1 per cent and 1.8 per cent in the Food, Beverages & Tobacco and Other Manufacturing sub-industries. The industry was hampered by reduced demand for locally manufactured items.

The Food, Beverages & Tobacco sub-industry was impacted primarily by lower production of beer and stout, as well as sugar and molasses which were affected by a lower volume of cane reaped. Tempering the decline was increased output for chicken meat, cornmeal, carbonated beverages, rum, alcohol and flour. Within the Other Manufacturing sub-industry, lower production was recorded for the Chemicals and Chemical products component, partly reflecting declines in aluminium sulphate and paint. Production of Petroleum Products also declined, stemming from decreased output of gas, diesel and LPG. Within the Non-metallic Minerals component, cement output increased as a result of higher demand from the Construction industry.

Construction

The Construction industry contributed 0.1 per cent to total GDP growth and grew by 1.8 per cent, following a decline in 2012. The industry's share of GDP grew by 0.1

TABLE 5.3
CONTRIBUTION TO GROSS DOMESTIC PRODUCT IN BASIC VALUES AT CONSTANT (2007) PRICES, 2009 - 2013
(PER CENT)

	2009	2010	2011	2012	2013
GOODS PRODUCING INDUSTRY	24.2	24.0	24.9	24.5	24.6
Agriculture, Forestry & Fishing	6.0	6.1	6.6	6.8	6.7
Mining & Quarrying	2.1	2.1	2.4	2.2	2.3
Manufacture	8.7	8.5	8.6	8.5	8.4
of which: Food, Beverages & Tobacco	4.6	4.6	4.7	4.7	4.7
Other Manufacturing	4.2	3.9	3.9	3.8	3.7
Construction	7.3	7.3	7.3	7.0	7.1
SERVICES INDUSTRY	80.8	80.4	79.3	79.5	79.4
Electricity & Water Supply	3.4	3.3	3.3	3.2	3.2
Transport, Storage & Communication	11.5	11.3	11.0	11.0	11.0
Wholesale & Retail Trade; Repair and Installation of Machinery	18.5	18.1	17.9	17.7	17.6
Finance & Insurance Services	11.4	11.2	11.0	11.2	11.2
Real Estate, Renting & Business Activities	10.9	10.9	10.7	10.8	10.8
Producers of Government Services	13.1	13.3	13.2	13.2	13.2
Hotels and Restaurants	5.1	5.4	5.4	5.5	5.6
Other Services	6.9	6.9	6.8	6.9	6.9
Less Financial Intermediation Services Indirectly Measured (FISIM)	5.0	4.4	4.2	4.1	4.0
TOTAL GDP AT BASIC PRICES	100.0	100.0	100.0	100.0	100.0

Discrepancies due to rounding.

Source: Statistical Institute of Jamaica

TABLE 5.4
CONTRIBUTION TO TOTAL GOODS AND SERVICES PRODUCTION, 2009-2013
(PER CENT)[a]

	2009	2010	2011	2012	2013
GOODS PRODUCING INDUSTRY	23.0	23.0	23.9	23.6	23.6
Agriculture, Forestry & Fishing	5.7	5.8	6.3	6.5	6.5
Mining & Quarrying	2.0	2.0	2.3	2.1	2.2
Manufacture	8.3	8.2	8.2	8.2	8.1
of which: Food, Beverages & Tobacco	4.4	4.4	4.5	4.5	4.5
Other Manufacturing	4.0	3.8	3.7	3.7	3.6
Construction	7.0	7.0	7.0	6.7	6.8
SERVICES INDUSTRY	77.0	77.0	76.1	76.4	76.4
Electricity & Water Supply	3.3	3.2	3.2	3.1	3.0
Transport, Storage & Communication	10.9	10.8	10.5	10.6	10.6
Wholesale & Retail Trade; Repair and Installation of Machinery	17.7	17.3	17.2	17.0	17.0
Finance & Insurance Services	10.9	10.7	10.6	10.7	10.8
Real Estate, Renting & Business Activities	10.4	10.5	10.3	10.3	10.3
Producers of Government Services	12.4	12.7	12.7	12.7	12.7
Hotels and Restaurants	4.9	5.1	5.2	5.3	5.3
Other Services	6.5	6.6	6.5	6.6	6.6
TOTAL GDP AT BASIC PRICES	100.0	100.0	100.0	100.0	100.0

a - Previously presented as "Normalised Contribution to GDP at Constant Prices." This table expresses the constant price value added of each industry as a share of the total GDP for Goods and Services, excluding financial intermediation services indirectly measured

Discrepancies due to rounding

Source: Statistical Institute of Jamaica

percentage point to 7.1 per cent. Construction was the only Goods Producing industry to register consistent quarterly growth throughout the year, with stronger value added growth during the latter half.

Increased activity was recorded for all three components of the industry. Higher output was recorded for the Building Construction component of the industry which benefited from increased residential construction projects as well as the construction and expansion of hotels. Consistent with the increase in Building Construction, Building Installation was estimated to have expanded. The Other Construction component of the industry benefited from increased civil engineering activity, stemming from road construction (North–South link of Highway 2000) and rehabilitation works. Growth in the industry was supported by an increase in the value of construction materials imported to the island.

Electricity & Water Supply

Real value added for the Electricity & Water Supply industry declined by 2.0 per cent in 2013, the fourth consecutive year of contraction (Table 5.2). This was the largest decline by any industry and detracted 0.1 percentage point from the rate of GDP growth. The industry's share of GDP remained relatively the same at 3.2 per cent. There was a slowing in the rate of decline in the latter half of the year due to an expansion in the fourth quarter.

The decline in real value added resulted from contractions in both electricity consumption[7] and water production. Electricity consumption fell by 2.1 per cent to 3 061.2 GWh. This resulted from a 6.8 per cent increase in line losses which outweighed the 0.1 per cent increase in electricity generation. Water production declined by 1.5 per cent to 298 029.9 megalitres, stemming from drought in the first half of the year. Water consumption also declined.

Transport, Storage & Communication

Real value added for the Transport, Storage & Communication industry increased by 0.2 per cent, the first registered growth since 2007. The industry's share of GDP remained at 11.0 per cent. The improvement in real value added was consequent on improvements in the Communication sub-industry as the Transport & Storage component declined. The improvement in communication activities resulted from lower call rates and increased competition between service providers. The contraction in the Transport & Storage component mainly reflected a reduction in maritime transport. There was a 2.6 per cent decline in the number of ship calls to the island reflecting mainly fewer calls at the Port of Kingston. In addition, the total volume of cargo handled declined by 6.4 per cent. Air transport improved resulting from the addition of new flights which led to an increase in total passenger movement.

7 Electricity Consumption is calculated as follows: Electricity Generation less Line Losses.

Wholesale and Retail Trade; Repairs & Installation of Machinery (WRTRIM)

The WRTRIM industry is the largest industry and accounted for 17.6 per cent of GDP, 0.1 percentage point lower than 2012 (Table 5.3). For 2013, the WRTRIM industry declined by 0.1 per cent, the second consecutive year of decline. The industry's performance was influenced by lower business and consumer confidence as well as reduced government spending resulting from fiscal consolidation. Further, a decline in real income, a contraction in the value of imports and lower gross sales also negatively impacted the industry. Analysis of preliminary General Consumption Tax (GCT) data indicated that six of the nine goods categories recorded lower sales. These were: Food, Beverages & Tobacco; Automobiles, Commercial & Transport Equipment; Textiles, Clothing and Shoes; Furniture, Furnishings, Office Equipment & Jewellery; Electronics, Musical & Photography Equipment; and Other Manufactured Goods.

Finance & Insurance Services

Real value added for the Finance & Insurance Services industry increased by 0.5 per cent and continued to account for 11.2 per cent of GDP. The industry's growth out-turn was just below the 0.6 per cent average recorded for the 2008–2012 period. The industry contributed 0.1 percentage point to the growth in GDP. The increase in real value added emanated mainly from higher net interest income at commercial banks and an increase in revenue earned from fees and commission income. In addition, increases in funds under management and net premium income at insurance companies also contributed to the improved performance.

Producers of Government Services[8]

Real value added for Producers of Government Services industry declined by 0.2 per cent, the second consecutive year of decline. This should be viewed against an average increase of 0.1 per cent for the five years since 2008. This performance is in line with fiscal discipline imposed by the government in an attempt to reduce the debt profile of the country. The average number of paid Government employees declined by 500 persons to 146 700.

TABLE 5.5
VALUE ADDED BY INDUSTRY AT CURRENT PRICES 2009 - 2013

	2009	2010	2011	2012	2013
GOODS PRODUCING INDUSTRY	223 250.5	236 366.9	260 411.5	274 160.3	301 792.0
Agriculture, Forestry & Fishing	59 812.6	62 331.3	70 438.2	75 464.9	84 403.3
Mining & Quarrying	8 935.7	12 720.5	15 486.8	14 811.5	16 920.0
Manufacture	87 206.4	88 783.0	96 565.7	103 553.6	110 182.6
of which: Food, Beverages & Tobacco	47 093.5	49 012.9	54 217.6	58 408.3	63 332.2
Other Manufacturing	40 112.9	39 770.1	42 348.0	45 145.3	46 850.2
Construction	67 295.8	72 532.1	77 920.8	80 330.4	90 286.1
SERVICES INDUSTRY	754 069.0	799 691.7	852 318.9	896 959.2	951 253.9
Electricity & Water Supply	28 471.7	33 373.7	35 867.2	35 236.3	38 307.1
Transport, Storage & Communication	99 124.6	100 782.4	104 329.5	101 388.4	104 479.8
Wholesale & Retail Trade; Repair and Installation of Machinery	175 521.9	186 511.2	201 490.7	214 156.4	233 280.7
Finance & Insurance Services	105 090.0	104 030.2	111 869.1	117 280.8	121 503.8
Real Estate, Renting & Business Activities	102 500.6	123 194.0	130 771.1	138 684.0	146 000.1
Producers of Government Services	137 618.6	142 580.9	152 707.7	167 043.1	174 062.3
Hotels and Restaurants	44 907.6	44 402.3	45 480.5	48 175.4	52 857.6
Other Services	60 834.0	64 817.0	69 803.2	74 994.7	80 762.5
Less Financial Intermediation Services Indirectly Measured (FISIM)	48 126.4	45 028.5	45 755.2	47 792.4	49 928.5
TOTAL GDP AT BASIC PRICES	929 193.1	991 030.0	1 066 975.2	1 123 327.1	1 203 117.4
TAXES LESS SUBSIDIES ON PRODUCTS	136 525.4	162 647.9	172 790.3	189 724.5	217 382.2
GDP AT MARKET PRICES*	1 065 718.5	1 153 677.9	1 239 765.5	1 313 051.7	1 420 499.6

NOTE: * Total GDP at Market Prices, is the sum of: Total GDP at Basic Prices and Taxes Less Subsidies on Products

Source: Statistical Institute of Jamaica

8 Producers of government services are public sector entities engaged in activities such as public administration, defence, education, health, sanitary and welfare services. National accounting convention measures the value of output of producers of government services as the cost of providing these services. In addition, operating surplus, by convention, is set at zero so that value added is essentially composed of compensation to employees. Based on current national accounting methodology, changes in real value added in this industry would be proportional to changes in employment levels.

Hotels & Restaurants

The Hotels & Restaurants industry has recorded the most consistent growth performance, with no decline being recorded since 2001, when the industry was adversely impacted by the September 2001 terrorist attacks in the USA. For 2013, the industry grew by 0.9 per cent and contributed 0.1 percentage point to overall GDP growth. The industry's share of GDP was 5.6 per cent, continuing the upward trend started in 2007 when its share was 4.7 per cent.

The Hotels sub-industry was positively impacted by a 1.1 per cent increase in stopover arrivals. Recovery from the impact of Hurricane Sandy, as well as the introduction of new flights, contributed to this performance. In addition, continued marketing and promotion also aided in attracting visitors to the island. For the first half of the year, stopover arrivals declined by 1.2 per cent. This was, however, outweighed by a 3.8 per cent increase in the latter half of the year. The average length of stay for visitors decreased for the review period. The Restaurant sub-industry was estimated to have increased consequent on increased demand.

GDP at Current Prices

Total GDP at market prices (nominal GDP) for 2013 stood at $1 420 499.6 million, of which the Goods Producing Industry accounted for $301 792.0 million, and the Services industry $951 253.9 million (Table 5.5). The out-turn in total GDP represented a nominal increase of 8.2 per cent compared with 2012. During the review year, Taxes Less Subsidies on Products was 15.3 per cent of total GDP at market prices relative to 14.4 per cent during 2012.

OUTLOOK

The Jamaican economy is expected to grow in 2014. The performance is contingent on positive developments in both the global economy and the domestic market. The global economy is projected to increase by 3.6 per cent which is 0.6 percentage point higher than in 2013. The country is expected to benefit from growth in its main trading partners, specifically the United States, which is expected to grow by 2.2 per cent. This projected expansion is expected to lead to increased demand for Jamaica's products and services.

Within the domestic environment, an increase in economic activity is forecast based on:

- heightened investor confidence consequent on the continued implementation of the macroeconomic programme under the MEFP
- the impact of business reforms, such as the collateral registry and the implementation of the business super-form, and strategic investment projects
- continued building and road construction
- increased traction of key components under the Global Logistics Hub initiative
- improved linkages within the economy, due in part to import substitution brought about by a more competitive exchange rate and collaboration between key industries through the establishment of a Tourism Linkages Council.

Based on these factors, the industries expected to be the main drivers of growth are:

- Agriculture, Forestry & Fishing – the expansion of Agro Parks and increased crop yields enabling import substitution
- Mining & Quarrying – higher global demand will facilitate increased production of alumina and bauxite
- Construction – road construction and rehabilitation under the Major Development and Infrastructure Programme. Continued hotel construction as well as the programmed construction of several energy plants, is expected to boost performance
- Hotels & Restaurants – increased arrivals predicated on improvements in Jamaica's main source markets, increased stock of rooms and continued diversification of the tourism product and market expansion.

There are various downside risks to the country realizing the expected growth outlined above. These include:

- stronger than expected dampening effect of the fiscal consolidation efforts on domestic demand
- weather-related shocks and the impact of climate change on the built and natural environment
- negative impact of global geo-political events on commodity prices and global growth.■

CHAPTER 6

EXTERNAL TRADE

INTRODUCTION

The Jamaican economy registered Gross Domestic Product growth of 0.2 per cent, compared with 2012, when a contraction of 0.5 per cent was recorded. The higher real value added emanated from improvements in both the Goods Producing and Services industries. Despite the improvement in the wider economy, Jamaica's merchandise trade deficit worsened in 2013 due to a reduction in export receipts which outweighed the lower spending on imports.

Global economic output increased by 3.0 per cent in 2013 compared with a growth rate of 3.1 per cent for 2012[1]. This increase was due to an expansion in final demand in advanced economies, as well as higher inventory demand. Global trade volume (goods and services) grew by 2.8 per cent in 2013, mainly reflecting a rebound in exports, the main impetus to improved economic conditions in emerging market economies.

The Jamaican foreign exchange market experienced demand pressures throughout the year resulting in nominal and real depreciation rates of 12.6 per cent and 4.4 per cent, respectively, in the currency vis-à-vis the United States dollar.

POLICY & PROGRAMMES

Policy Formulation

National Trade Policy

In 2013, Jamaica continued further revisions to the National Trade Policy and held additional consultations with stakeholders. Completion of the policy is slated for the end of FY2013/2014. The revision of the policy began in September 2011 with the primary goal of increasing Jamaica's economic prosperity through engagement in the world economy.

Implementation and Negotiation of Trade Agreements

Economic Partnership Agreement (EPA)

The EPA includes arrangements to provide financial and technical support to members of the Caribbean Forum of ACP States (CARIFORUM) as they cope with the challenges posed by the Agreement to the region's public and private sectors. Through these arrangements, the European Union (EU) has facilitated the reform of public institutions, and the upgrade and diversification of products and services from the private sector.

Jamaica continued to focus on the EPA Implementation process and undertook the following actions:

- Commencement of the second phase of tariff reductions that were due on January 1, 2013
- participation in meetings of the Trade and Development Committee and the EPA National Coordinators meeting in November to assess the implementation of the Agreement, as well as on other technical issues germane to the operation of the Agreement
- Development of the Economic Partnership Agreement Capacity Building II project for €5.0 million in collaboration with the Delegation of the European Union, which will focus on addressing supply-side constraints in the domestic market. The overall objective of the Project is to support the Government in addressing the trade deficit, accelerating exports, enhancing competitiveness and integrating the economy into global markets. EPA II will expand the focus of the existing EPA Capacity Building Project to provide assistance to small and medium enterprises (SMEs).

Caribbean Regional Indicative Programme (CRIP)

The CRIP is financed through allocations for regional programming over a specific time period, and provides support to aid the implementation of the CARIFORUM-EU Economic Partnership Agreement (EPA). A total of €165 million was allocated for the 10th European Development Fund (EDF) CRIP.

Status of the 10th EDF Programming and Implementation

As at September 2013, a total of €136.5 million (83 per cent of the total 10th EDF allocation for the Caribbean) was committed, and Financing Agreements signed for the following programmes:

- Regional Technical Cooperation Facility (TCF), €3.0 million
- Regional Private Sector Development Programme (Caribbean Export), €28.3 million
- Haiti/Dominican Republic Bi-National Cooperation, €17.0 million
- Economic Integration and Trade of the OECS Region, €8.6 million
- CSME and Economic Cooperation Programme, €27.5 million

1 World Economic Outlook Update – January 2014

— Programme of Support to CARIFORUM for EPA Implementation, €46.5 million

At the end of October 2013, €23.04 million (14.0 per cent of the total EDF allocation) was approved at the Action Fiche[2] stage and was slated for commitment by the end of the year for the following programmes:

— CARIFORUM Crime and Security Cooperation Programme (€12.2 million)

— support to facilitate participation of CARIFORUM civil society in the regional development and integration process (€4.250 million)

— Programme of Support for Wider Caribbean Cooperation (€6.6 million)

The CARIFORUM Directorate in collaboration with key stakeholders is expected to continue spearheading the programming of the remaining resources under the CRIP. The Regional Strategy Paper/Regional Indicative Programme (RSP/RIP) continues to remain relevant and is to be maintained without any alteration in the programme interventions.

11th EDF - CRIP

The Summit of EU Member States approved a budget of €26.9 billion for the 11th EDF[3]. A meeting of Regional Stakeholders was convened from September 17–18, by the CARIFORUM Directorate, to discuss the 11th EDF CRIP. Consultations are on-going between the CARIFORUM Directorate and the EU with respect to the technical details of the programming and implementation of the funds.

11th EDF - National Indicative Programme (NIP)

It has been provisionally agreed that, for Jamaica, Security and Environment will be the two sectors targeted for support under the 11th EDF. Jamaica's NIP envelope under the 11th EDF has been approved at €45.5 million – the higher end of the range of €36.4 million to €45.5 million.

CARICOM/CSME

Work continued on the implementation of CSME obligations under the Revised Treaty of Chaguaramas in 2013. Member States met on December 11–12, to examine issues relating to the free movement of persons throughout the Community. Following this meeting, Jamaica amended the Caribbean Community (Free Movement of Skilled Persons) Act to include all 10 categories eligible for the movement of skills under the CSME Regime.

The CARICOM (CSME Unit) commenced a consultancy, in October 2013, under the CARICOM Trade and Competitiveness Project (CTCP)[4], Component 100. CTCP Component 100, which focuses on the standardization and harmonization of administrative practices and procedures across the CSME, was officially launched in Kingston in October.

Bilateral Agreements

During the year, the CARICOM Secretariat engaged the services of a consultant to examine the Region's performance under bilateral trade agreements with Colombia, Venezuela, Cuba, the Dominican Republic and Costa Rica. The consultancy was specificially aimed at addressing concerns about the under-utilization of these agreements by the majority of CARICOM Member States.

A Draft Study was prepared by the Consultant and submitted for review at a meeting of Senior Trade Officials of CARICOM to be held in February 2014. It is expected that the findings of the Study will guide the Region in its efforts to more effectively utilize these Trade Agreements.

United States of America (USA)/CARICOM

The Revised Trade and Investment Framework Agreement (TIFA) was signed in March 2013. The Agreement provides the framework for discussions on trade and investment issues between the USA and CARICOM.

Jamaica participated in the Fifth Meeting of the CARICOM-USA Trade and Investment Council (TIC) in November. The meeting addressed several issues of importance on the bilateral agenda, including a request for support from the USA regarding the Caribbean Regional Aid for Trade Strategy and assistance to ensure the Region's compliance with the US Food and Safety Modernization Act (FSMA). The Act, which was introduced in January 2011, requires Jamaican and other exporters to meet higher food safety standards in the US market. Concerns were also re-iterated about the threat posed to the competitiveness of the regional rum industry in the US market, by subsidies provided by the US Virgin Islands (USVI) and Puerto Rico to multinational rum producers. Further discussions on this matter are expected to be held at the technical level prior to the next meeting of the Council.

Jamaica continues to monitor developments in the US Congress related to the expiration of the tariff rate quota and additional duty for ethanol exports from non-Caribbean Basin Initiative (CBI) countries on December 31, 2011. This expiration removed the margin of preference exports from Jamaica and other CBI beneficiaries previously received, and exposed these exports to direct competition from large ethanol suppliers in non-CBI countries. To address this issue, a draft Ethanol Bill (HR 2564) was tabled in Congress on June 27, 2013 with the proposal to extend the additional duty on ethanol from non-CBI countries to 2016. If accepted it will reverse the expiration of the quota and additional duty.

CARICOM Regional Aid-For-Trade (AfT) Strategy

The CARICOM Regional AfT Strategy was approved by CARICOM Heads of Government in February and was formally launched on June 11 in Port-au-Prince, Haiti. The main objectives of the Strategy are to enhance the competitiveness of the export sector of the CARICOM

2 The stage in the European Union's programming cycle when a detailed project proposal is done.

3 This amount represents the total allocation for all African, Caribbean & Pacific States and Overseas Countries and Territories

4 The CTCP project is funded by the Government of Canada in collaboration with the CARICOM Secretariat and is aimed at developing and implementing best practice models, particularly in the area of legislation, across the region, in order to facilitate CSME implementation in Member States.

economies and to deepen their integration into the global economy. It highlights trade facilitation; sanitary and phytosanitary measures; quality infrastructure; services; private sector development; strengthening regional integration; and the capacity of regional institutions for specific intervention. The implementation of the Strategy is now a priority for the Region.

Geographical Indications Agreement (GIs Agreement)

In October 2012, Jamaica concluded the negotiation of a Bilateral Agreement on the Mutual Recognition and Protection of Geographical Indications with Switzerland. The Agreement was signed by both Parties in September 2013 in Geneva, Switzerland, and is aimed at protecting the intellectual property rights of Jamaican products and services in Switzerland.

World Trade Organization 4th Global Aid for Trade Review

Jamaica participated in the WTO's Fourth Global Aid for Trade Review held July 8–10 at WTO Headquarters in Geneva, Switzerland. The theme for the meeting, which was organized jointly by the WTO and the OECD in collaboration with five other key international organizations, was "Connecting to Value Chains". The meeting examined strategies to assist developing countries and least developed countries (LDCs) to enter and move up international value chains through development assistance in the context of the Post-2015 Development Agenda.

Discussions were also held on the changing nature of value chains and how developing countries and LDCs can best derive value from them. The focus of the meeting was particularly relevant to Jamaica in light of the range of initiatives being pursued at the national level, such as the establishment of Special Economic Zones and a Logistics Hub for the Caribbean, which will harness the potential of Aid for Trade to contribute to value chain creation and the pursuit of strategic development objectives.

ACP-EU ISSUES

Banana

The Banana Accompanying Measures (BAM) Financing Agreement was signed by the Government of Jamaica on March 26 in the amount of €4.73 million. The Financing Agreement will be executed over six years in two phases: (i) implementation within four years from commencement; and (ii) closure for two years. Jamaica is one of 10 ACP countries slated to benefit under the Banana Accompanying Measures (BAM) programme. The Ministry of Agriculture and Fisheries, through the Rural Agricultural Development Authority (RADA), in consultation with other stakeholders have commenced preparation of the first programme estimate and the grant contract for the Banana Board.

Sugar – Common Agricultural Policy (CAP) Reform

On June 26, the trilogue[5] reached a political agreement for the abolition of sugar quotas by 2017. This is three years earlier than the 2020 deadline requested by the ACP Group, which was supported by the European Parliament and other EU players, notably the European Sugar Manufacturers' Association and the European Beet Growers Federation. The ACP Group remains concerned that this early abolition will undercut the potential for ACP sugar, particularly since duty-free and quota-free access is considered to be worthless in the absence of a lucrative and predictable price. Discussions on this development and other related matters took place during the ACP Ministerial Conference on Sugar which was held in Fiji from October 14–18, under the theme "The Evolving Policy Environment for the ACP Cane Industry", at which Jamaica was present.

SELECTED MEETINGS/CONFERENCES ATTENDED IN 2013

United Nations Conference on Trade and Development (UNCTAD)

Jamaica participated in the Global Services Forum hosted by the Government of the Peoples' Republic of China in collaboration with UNCTAD on May 28–29 in Beijing, China.

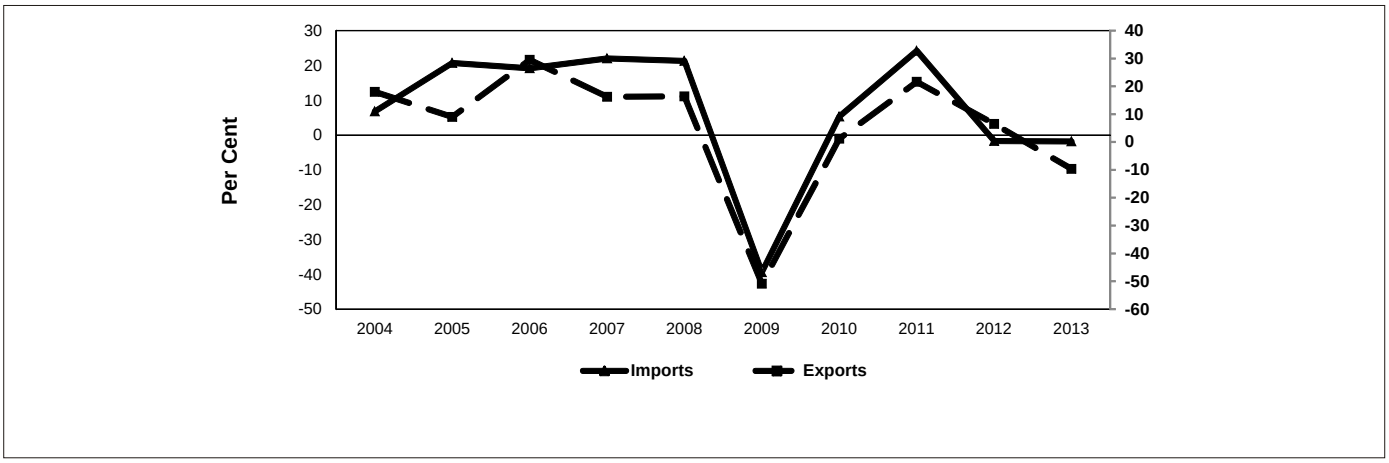

FIGURE 6A: GROWTH IN EXPORTS AND IMPORTS (%) 2004-2013

5 Consultations among the Members of the European Parliament, the Council of the EU, and the European Commission.

The Forum was held to advance the development agenda with regard to services and to raise awareness on the importance of the Services sector.

CARICOM Meetings

During 2013, Jamaica continued its active participation in the 36th and 37th meetings of the CARICOM Council for Trade and Economic Development (COTED), which were held in May and November, respectively, in order to advance the country's trade and economic interests. Jamaica also actively participated in the Special Session to consider the Strategic Direction of the COTED which was held on November 9, 2013, and used the opportunity to underscore issues of concern. These issues included the need to address the dual pricing of energy within the Region and to facilitate increased involvement by the regional private sector in the work of the COTED.

PERFORMANCE

EXTERNAL TRADE

Merchandise Trade

For 2013, Jamaica's merchandise trade deficit was US$4 658.7 million, a worsening of US$56.0 million relative to 2012 (Table 6.1). This out-turn reflected a 9.7 per cent fall-off in export receipts, which outweighed a 1.8 per cent decline in expenditure on imports (Table 6.1 and Figure 6A).

Traditional and Non-Traditional Domestic exports recorded declines of US$34.5 million and US$147.2 million, respectively. Earnings from Domestic exports fell by US$0.2 million to US$1.5 million, while Re-exports grew by US$13.1 million to US$80.8 million.

Merchandise Exports

Export receipts were US$1 559.9 million compared with US$1 728.4 million in 2012, owing to reduced earnings from six categories, which outweighed higher receipts in the remaining categories. Earnings from three categories: Crude Materials (excluding Fuel) {up US$20.1 million to US$685.5 million}; Mineral Fuels, etcetera (down US$36.7 million to US$351.2 million); and Food (down US$30.7 million to US$243.1 million) accounted for 82.0 per cent of total exports (Table 6.1). The fall-off in earnings from Mineral Fuels and Food stemmed from lower sales of Bunker C and Turbojet A1 Fuel, and a reduction in earnings from exports of Sugar. The largest decline in earnings was recorded for Chemicals which fell by US$115.1 million to US$113.4 million, due largely to lower demand for ethanol relative to 2012.

Traditional Domestic Exports

Earnings from Traditional Domestic Exports were US$779.5 million compared with US$814.0 million in 2012 (Table 6.2). This out-turn reflected a US$49.5 million decline in Manufacture exports, which outweighed higher receipts of US$12.9 million and US$2.1 million from Mining & Quarrying and Agriculture exports, respectively.

Lower Manufacture earnings mainly reflected weakened performance in Sugar exports, which earned US$53.2 million compared with US$94.1 million relative to 2012. Overall earnings for the category was also adversely impacted by reduced receipts from Rum (down US$7.5 million); Coffee Products (down US$1.0 million); and Cocoa Products (down US$0.1 million). Citrus Products was the only category to record higher receipts, with increased earnings of US$0.1 million (see Table 6.2).

Higher receipts from Mining & Quarrying emanated from increased exports of Alumina (up US$15.4 million). The growth in Alumina earnings was tempered by a decline of US$2.1 million in revenue from Bauxite exports. There were no exports of Gypsum during the year, compared with US$0.4 million in 2012.

Agriculture earnings amounted to US$22.1 million, compared with US$20.0 million in 2012. This uptick was due to growth in two categories: Coffee (up US$2.5 million); and Citrus (up US$1.4 million); which outweighed

TABLE 6.1
MERCHANDISE TRADE BY SITC SECTION, 2012–2013
US$ MILLION

	2012[r]			2013[p]			2013/2012 Absolute Change		2013/2012 Per Cent Change	
	Imports	Exports	Balance	Imports	Exports	Balance	Imports	Exports	Imports	Exports
Total Merchandise Trade	6 331.1	1 728.4	-4 602.7	6 218.6	1 559.9	-4 658.7	-112.5	-168.5	-1.8	-9.7
Of which Jamaica Free Zone	409.7	186.4	-223.3	303.2	101.2	-168.4	-140.1	-85.1	-26.0	-45.7
Food	948.3	273.8	-674.6	962.1	243.1	-719.1	13.8	-30.7	1.5	-11.2
Beverages and Tobacco	79.5	104.2	24.8	77.1	83.3	6.2	-2.4	-20.9	-3.0	-20.1
Crude Materials (excluding Fuel)	46.7	665.4	618.7	55.9	685.5	629.6	9.2	20.1	19.6	3.0
Mineral Fuels, etcetera	2218	387.9	-1 830.1	2 251.6	351.2	-1 900.4	33.6	-36.7	1.5	-9.5
Animal & Vegetable Oils and Fats	51.5	0.1	-51.4	42.9	0.4	-42.5	-8.6	0.2	-16.8	171.8
Chemicals	895.6	228.5	-667.2	773.1	113.4	-659.7	-122.5	-115.1	-13.7	-50.4
Manufactured Goods	616.4	17.6	-598.7	599.9	13.2	-586.7	-16.5	-4.5	-2.7	-25.3
Machinery and Transport Equipment	902.4	22.8	-879.6	898.4	38.9	-859.5	-4.0	16.1	-0.4	70.6
Misc. Manufactured Articles	454.4	18.4	-436.0	443.3	24.0	-419.3	-11.1	5.6	-2.4	30.3
Other	118.1	9.6	-108.5	114.3	6.8	-107.4	-3.9	-2.8	-3.3	-28.8

p - preliminary
r - revised

Source: Statistical Institute of Jamaica

declines in the remaining categories of which Cocoa accounted for the largest absolute decline of US$1.4 million.

Non-Traditional Domestic Exports

The overall decline in earnings from Non-Traditional Domestic Exports was due to lower earnings from Other (down US$149.4 million) and Beverages & Tobacco (excluding Rum)

TABLE 6.2
TRADITIONAL DOMESTIC EXPORTS, 2012-2013
US$ '000

	2012[r]	2013[p]	Absolute Change	Per Cent Change
TOTAL TRADITIONAL EXPORTS	813 966.0	779 484.5	-34 481.5	-4.2
Agriculture	20 021.0	22 126.4	2 105.4	10.5
Banana	121.0	61.7	-59.3	-49.0
Citrus	1 882.0	3 322.5	1 440.5	76.5
Coffee	13 779.0	16 327.0	2 548.0	18.5
Cocoa	1 936.0	503.7	-1 432.3	-74.0
Pimento	2 303.0	1 911.6	-391.4	-17.0
Mining and Quarrying	638 832	651 720.9	12 888.9	2.0
Bauxite	130 136.0	127 994.3	-2 141.7	-1.6
Alumina	508 333.0	523 726.6	15 393.6	3.0
Gypsum	364.0	0.0	-364.0	-100.0
Manufacture	155 113	105 637.3	-49 475.7	-31.9
Sugar	94 138.0	53 157.6	-40 980.4	-43.5
Rum	55 653.0	48 177.7	-7 475.3	-13.4
Citrus Products	254.0	349.5	95.5	37.6
Coffee Products	4 097.0	3 092.3	-1 004.7	-24.5
Cocoa Products	971.0	860.1	-110.9	-11.4
TOTAL NON TRADITIONAL EXPORTS	846 696.0	699 533.0	-147 163.0	-17.4
Food:	144 385.0	152 683.9	8 298.9	5.7
Pumpkins	531.0	708.4	177.4	33.4
Other Vegetables & Preparations thereof	2 425.0	2 666.5	241.5	10.0
Dasheen	1 658.0	1 562.9	-95.1	-5.7
Sweet Potatoes	2 838.0	3 565.5	727.5	25.6
Yams	19 610.0	22 221.4	2 611.4	13.3
Papayas	4 471.0	3 364.6	-1 106.4	-24.7
Ackee	13 873.0	15 543.5	1 670.5	12.0
Other Fruits & Fruit Preparations	7 040.0	5 681.5	-1 358.5	-19.3
Meat & Meat Preparations	3 862.0	4 964.3	1 102.3	28.5
Dairy Products & Bird's Eggs	6 900.0	6 236.9	-663.1	-9.6
Fish, Custaceans & Molluscs	8 928.0	10 997.7	2 069.7	23.2
Baked Products	11 616.0	12 396.3	780.3	6.7
Juices excluding Citrus	8 564.0	7 251.9	-1 312.1	-15.3
Animal Feed	9 470.0	11 665.3	2 195.3	23.2
Sauces	14 572.0	15 041.7	469.7	3.2
Malt Extract & Preparations thereof	4 790.0	4 520.5	-269.5	-5.6
Other Food Exports	23 238.0	24 294.9	1 056.9	4.5
Beverages & Tobacco (excl. Rum):	48 213.0	34 980.4	-13 232.6	-27.4
Non-Alcoholic Beverages	9 340.0	11 532.2	2 192.2	23.5
Alcoholic Beverages (excl. Rum)	38 779.0	23 429.2	-15 349.8	-39.6
Tobacco	93.0	18.9	-74.1	-79.6
Crude Materials:	26 450	33 634.6	7 184.6	27.2
Limestone	1 490.0	2 532.3	1 042.3	70.0
Waste and Scrap Metal	21 999.0	26 633.6	4 634.6	21.1
Other	2 962.0	4 468.7	1 506.7	50.9
Other:	627 649	478 234.1	-149 414.9	-23.8
Mineral Fuels, etc.	387 742.0	351 222.9	-36 519.1	-9.4
Animal & Vegetable Oils & Fats	144.0	373.5	229.5	159.4
Chemicals (incl. Ethanol)	223 895.0	108 324.0	-115 571.0	-51.6
Manufactured Goods	4 452.0	4 398.0	-54.0	-1.2
Machinery and Transport Equipment	1 570.0	3 210.0	1 640.0	104.5
Wearing Apparel	1 430.0	1 363.0	-67.0	-4.7
Furniture	962.0	545.0	-417.0	-43.3
Other Domestic Exports	7 455.0	8 799.0	1 344.0	18.0

p - preliminary
r - revised
Discrepancies in table due to rounding

Source: Statistical Institute of Jamaica

{down US$13.2 million}, which offset higher receipts from Food and Crude Materials which grew by US$8.3 million and US$$7.2 million, respectively.

Reduced exports of Chemicals (including Ethanol) which earned US$108.3 million compared with US$223.9 million in 2012, was the largest contributor to the downturn in the category Other. This was compounded by declines in four additional categories: Mineral Fuels (down US$36.5 million); Furniture (down US$0.4 million); Wearing Apparel (down US$0.1 million); and Manufactured Goods (down US$0.1 million). Increased earnings were recorded for Machinery & Transport Equipment (up US$1.6 million); Other Domestic Exports (up US$1.3 million); and Animal & Vegetable Oils & Fats (up US$0.2 million).

Receipts from Beverages & Tobacco (excluding Rum) were US$35.0 million, compared with US$48.2 million in 2012. This emanated from declines of US$15.3 million and US$0.1 million in export earnings from Alcoholic Beverages (excluding Rum) and Tobacco, respectively. Lower earnings from these subcategories offset the higher receipts from Non-Alcoholic Beverages which grew by US$2.2 million to US$11.5 million relative to 2012.

Earnings from Food exports grew by US$8.3 million to US$152.7 million, owing to growth in receipts from 11 subcategories. Other Food Exports (up US$1.1 million to US$24.3 million); Yams (up US$2.6 million to US$22.2 million); Ackee (up US$1.7 million to US$15.5 million); Sauces (up US$0.5 million to US$15.0 million); and Baked Products (up US$0.8 million to US$12.4 million) were the major export earners, accounting for 59.0 per cent of receipts, combined (see Table 6.2). Reduced receipts were recorded for six subcategories, with the largest absolute decline recorded by Other Fruits & Fruit Preparations (down US$1.4 million to US$5.7 million); Juices (excluding Citrus) {down US$1.3 million to US$7.3 million}; and Papayas (down US$1.1 million to US$3.4 million).

Receipts from Crude Materials exports were US$33.6 million compared with US$26.5 million. This improvement stemmed from higher earnings from all subcategories. Waste and Scrap Metal was the primary source of receipts, accounting for 79.2 per cent of total earnings, with US$26.6 million, an increase of US$4.6 million relative to 2012. This out-turn was due to the January 2013 removal of the ban on the exportation of scrap metals. Earnings from Other and Limestone grew by US$1.5 million and US$1.0 million to US$4.5 million and US$2.5 million, respectively.

Merchandise Imports

Expenditure on total imports amounted to US$6 218.6 million, a decline of US$112.5 million relative to 2012, reflecting lower spending on seven of the ten categories of imports. The main commodity groups imported during the year were: Mineral Fuels (up US$33.6 million to US$2 251.6 million); Food (up US$13.8 million to US$962.1 million); Machinery & Transport Equipment (down US$4.0 million to US$898.4 million); and Chemicals (down US$122.5 million to US$773.1 million); which combined, accounted for 79.0 per cent of total imports (see Table 6.1). Lower spending on Chemicals reflected lower importation of organic chemicals (primarily ethanol related products), and medicinal pharmaceutical products.

Imports by End-Use Classification

Lower expenditure was recorded for three categories of imports classified by end use relative to 2012. These were Raw Materials/ Intermediate Goods (down US$91.2 million to US$3 909.6 million; Consumer Goods (excluding Motor Cars) {down US$24.2 million to US$1 590.9 million}; and Passenger Motor Cars, which declined by US$10.3 million to US$210.7 million. Capital Goods (excluding Motor Cars)

TABLE 6.3
IMPORTS BY END USE CLASSIFICATION, 2012-2013
US$ MILLION

	2012[r]	2013[p]	2013/2012 Absolute Change	2013/2012 Per Cent Change
TOTAL IMPORTS (incl. Single Entity Free Zone)	6 331.1	6 218.6	-112.5	-1.8
Of which Jamaica Free Zone	409.7	303.2	-106.4	-26.0
Consumer Goods (excl. Motor Cars)	1 615.1	1 590.9	-24.2	-1.5
Food (incl. Beverages)	667.0	669.7	2.7	0.4
Non-Durable Goods	472.5	454.0	-18.6	-3.9
Semi-Durable Goods	159.2	154.2	-5.0	-3.2
Other Durable Goods (excl Motor Cars)	316.3	313.1	-3.3	-1.0
Raw Material / Intermediate Goods	4 000.8	3 909.6	-91.2	-2.3
Food (incl. Beverages)	352.5	341.4	-11.1	-3.1
Industrial Supplies	1 169.3	1 050.9	-118.4	-10.1
Crude Oil	905.9	930.0	24.2	2.7
Other Fuels and Lubricants	1 308.4	1 320.9	12.5	1.0
Parts & Access. of Capital Goods	264.7	266.3	1.6	0.6
Capital Goods (excl. Motor Cars)	494.2	507.4	13.2	2.7
Other Indus. Transport Equipment	88.2	73.7	-14.5	-16.5
Construction Materials	139.0	153.9	15.0	10.8
Machinery and Equipment	257.9	272.7	14.9	5.8
Other Capital Goods	9.2	7.1	-2.1	-22.9
Passenger Motor Cars*	221.0	210.7	-10.3	-4.7

*This includes cars imported to be used as Consumer Goods or Capital Goods
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

{up US$13.2 million to US$507.4 million} was the only category for which higher expenditure was recorded (Table 6.3).

The lower spending on goods imported as Raw Materials/Intermediate Goods emanated from reduced expenditure of US$118.4 million and US$11.1 million on Industrial Supplies — owing to the lower ethanol imports — and Food (including Beverages), respectively. There was higher expenditure on imports of Crude Oil; Other Fuels & Lubricants; and Parts & Accessories of Goods.

Reduced expenditure on Non-Durable Goods (down US$18.6 million to US$454.0 million) was the main contributor to the country's lower spending on Consumer Goods (excluding Motor Cars). There was also lower spending on Semi-Durable Goods (down US$5.0 million to US$154.2 million) and Other Durable Goods (excluding Motor Cars) {down US$3.3 million to US$313.1 million). The fall in expenditure by these categories was partially offset by higher spending of US$2.7 million on Food (including Beverages).

Within Capital Goods (excluding Motor Cars), Construction Materials and Machinery & Equipment valued at US$153.9 million and US$272.7 million, respectively, were the main commodities imported, and were the only subcategories to record increases. The higher importation of construction materials partly reflected increased building projects during 2013. Lower expenditure was recorded for Other Industrial Transport Equipment (down US$14.5 million) and Other Capital Goods (down US$2.1 million) {see Table 6.3}.

CARICOM Trade

Jamaica's trade deficit with CARICOM was US$880.7 million, a worsening of US$124.1 million compared with 2012. This out-turn reflected a US$108.2 million increase in expenditure on imports, primarily Mineral Fuels, and a decline of US$15.8 million in export receipts compared with 2012 (Table 6.4).

The higher import expenditure was due to increased spending on Mineral Fuels (up US$103.1 million to US$671.2 million) and Food (up US$14.6 million to US$162.2 million), which combined accounted for 87.9 per cent of total expenditure on imports from the region. The main food items imported were cereal and cereal preparations; vegetables and fruit preparations; coffee, tea, cocoa, spices and manufactures thereof; and sugar and sugar preparations. Lower spending was recorded for all other categories of imports except Crude Materials (excluding Fuel) and Other, for which spending was flat relative to 2012.

Exports of Food which grew by US$1.1 million to US$35.3 million and Beverages & Tobacco (up US$1.8 million to US$11.0 million) accounted for the majority (68.7 per cent) of export earnings for 2013. Growth was also recorded for Crude Materials (excluding Fuels) and Animal & Vegetable Oils & Fats. However, these increases were outweighed by lower receipts from the remaining export categories. The highest absolute decline was recorded by Mineral Fuels, etcetera, which declined by US$13.2 million to US$0.7 million (see Table 6.4).

The majority of the commodities imported from the region during the year was from Trinidad and Tobago and amounted to US$754.3 million or 79.5 per cent of total expenditure. The country was also the leading purchaser of Jamaica's exports, accounting for 24.2 per cent of total receipts from the region, with purchases valued at US$16.3 million.

FOREIGN EXCHANGE MARKET

The average nominal exchange rate at the end of December 2013 was $106.38 per US$1.00, which represented nominal depreciation of 12.6 per cent, and real depreciation of 4.4 per cent vis-à-vis the United States dollar. This compares with nominal and real depreciation rates of 6.9 per cent and 0.7 per cent for 2012, respectively.

The increased pace of depreciation relative to 2012 reflected inadequate levels of private inflows to meet heightened demand owing to uncertainty surrounding the terms of and delay in signing an agreement with the International Monetary Fund (IMF) during the first half of 2013. The decline in the NIR relative to 2012, which contributed to the unease in the foreign exchange market, also resulted in a further depreciation of the local currency.

TABLE 6.4
MERCHANDISE TRADE WITH CARICOM BY SITC SECTION, 2012–2013
US$ MILLION

	2012[r]			2013[p]			2013/2012 Abs. Change	
	Imports	Exports	Balance	Imports	Exports	Balance	Imports	Exports
S.I.T.C. Sections	839.9	83.2	-756.6	948.1	67.4	-880.7	108.2	-15.8
Of which Jamaica Free Zone	4.4	2.1	-2.4	5.2	2.6	-2.6	0.7	0.5
Food	147.6	34.3	-113.3	162.2	35.3	-126.9	14.6	1.1
Beverages & Tobacco	40.1	9.2	-30.9	39.0	11.0	-28.1	-1.0	1.8
Crude Materials (excl. Fuels)	0.8	0.7	-0.1	0.8	1.4	0.5	0.0	0.7
Mineral Fuels, etcetera	568.1	13.9	-554.2	671.2	0.7	-670.4	103.1	-13.2
Animal & Vegetable Oils & Fats	1.4	0.1	-1.3	1.2	0.3	-1.0	-0.2	0.2
Chemicals	29.8	14.1	-15.8	27.6	9.2	-18.4	-2.2	-4.8
Manufactured Goods	25.2	2.6	-22.6	23.7	2.0	-21.7	-1.5	-0.6
Machinery and Transport Equip.	11.3	1.9	-9.3	8.0	1.4	-6.6	-3.3	-0.5
Misc. Manufactured Articles	15.6	5.1	-10.5	14.3	4.9	-9.3	-1.4	-0.2
Other	0.0	1.5	1.5	0.0	1.2	1.2	0.0	-0.3

p - preliminary
r - revised

Source: Statistical Institute of Jamaica

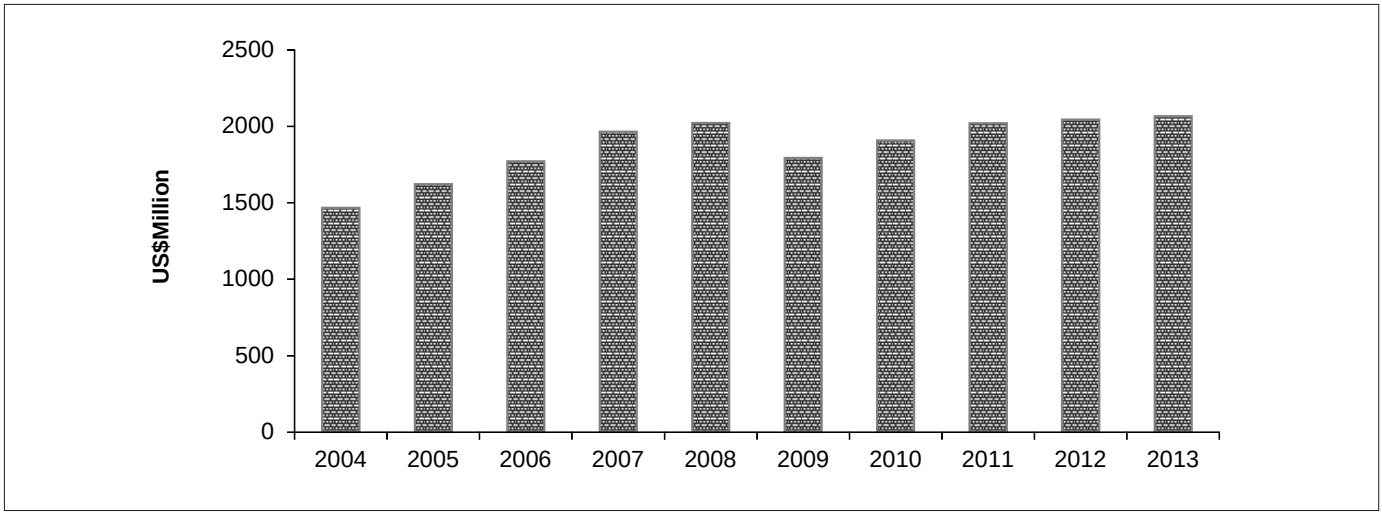

FIGURE 6B: ANNUAL REMITTANCE INFLOWS 2004-2013

TABLE 6.5
JAMAICA'S REMITTANCE INFLOWS, 2012–2013
US$ MILLION

Main Channels of Remittances	2012[r]	2013[p]	2013/2012 Abs. Change	2013/2012 Per Cent Change
Remittance Companies	1 758.2	1 760.6	2.4	0.1
Other Remittances	284.3	304.4	20.1	7.1
Total Inflows	**2 042.5**	**2 065.0**	**22.5**	**1.1**
Total Outflows	**267.4**	**240.5**	**-26.9**	**-10.1**
Net Remittances	**1 775.1**	**1 824.5**	**49.4**	**2.8**

r - revised
p - preliminary
Discrepancies in table due to rounding

Source: Bank of Jamaica

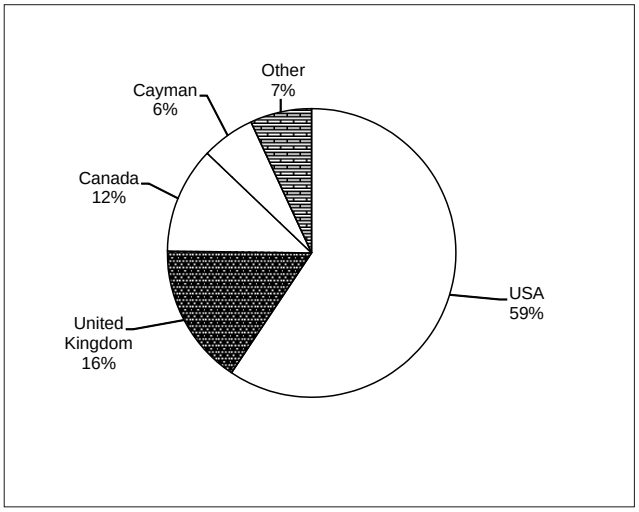

FIGURE 6C: SHARE OF REMITTANCE INFLOWS BY SOURCE COUNTRY, 2013

REMITTANCES

For 2013, total remittance inflows was US$2 065.0 million compared with US$2 042.5 million in 2012 (Figure 6B and Table 6.5). This out-turn emanated from increased inflows via Other Remittances (up US$20.1 million) and Remittance Companies (up US$2.4 million). Total Remittance Outflows amounted to US$240.5 million, a decline of US$26.9 million. Net Remittances were US$1 824.5 million compared with US$1 775.1 million in 2012. Remittance inflows for the calendar year were marginally above the pre-crisis out-turn of US$2 021.3 million in 2008.

A disaggregation of remittance inflows by source country indicated that of total inflows received, the United States of America accounted for 59.0 per cent or US$1 226.1 million; the United Kingdom 16.0 per cent or US$326.8 million; Canada 12.0 per cent or US$246.1 million; Cayman 6.0 per cent or US$123.3 million; and Other 7.0 per cent or US$142.8 million (Figure 6C).

Higher inflows were received from three source countries relative to 2012. Inflows from the United States of America increased by US$27.8 million; inflows from Canada grew by US$4.5 million; while monies received from Other countries were US$3.9 million higher. Conversely, Jamaica received lower inflows from the United Kingdom (down US$12.4 million) and Cayman (down US$1.4 million).

OUTLOOK

Global economic conditions are expected to record further improvements in 2014. Global output and trade volumes are projected to increase by 3.7 per cent and 4.5 per cent, respectively. The improved performance will be driven mainly by final domestic demand, supported in part by a reduction in the fiscal drag as a result of the recent budget agreement in the United States. Commodity prices which have been trending downwards are expected to continue on this trajectory during the year, with oil and non-fuel commodities forecast to decline by 0.3 per cent and 6.1 per cent, respectively.

These projected improvements in the global economy are expected to positively impact domestic economic performance in 2014, with real GDP projected to increase. The expected reductions in global oil prices may also translate into improved external trade performance. Continued achievement of the targets outlined in the Extended Fund Facility with the IMF may result in a strengthening of confidence in the market and by extension higher private inflows.■

CHAPTER 7

MONEY & INFLATION

INTRODUCTION

Jamaica's monetary policy operated during 2013 against the background of unsustainably high public debt levels, low economic growth, balance of payments pressures and low investor confidence. To address these constraints, the Government of Jamaica (GOJ) entered into negotiations with the International Monetary Fund (IMF). On May 1, 2013, the Executive Board of the IMF approved a four-year (FY 2013/14– FY 2016/17) Extended Arrangement under the Extended Fund Facility (EFF) valued at SDR 615.38 million (225.0 per cent of quota). This led to the disbursement of the first tranche of US$207.2 million. During 2013, the IMF completed two successful quarterly reviews of Jamaica's macroeconomic performance, thereby facilitating the disbursements of additional funds during the year.

The Bank of Jamaica (BOJ) lowered the interest rate payable on its 30-day Certificate of Deposit (CD) on February 25, 2013. This was consistent with the decline in rates on domestic instruments subsequent to the successful completion of the National Debt Exchange (NDX). The cash reserve and liquid assets requirements were maintained at 12.0 per cent and 26.0 per cent, respectively. Notwithstanding this, the Central Bank continued to offer special longer dated operations and introduced special repurchase agreements to augment its liquidity management operations during the year.

Inflation for 2013 was 9.5 per cent, 1.5 percentage points higher than the rate recorded for 2012. Inflationary impulses during 2013 stemmed mainly from:

- higher transport-related expenses
- some pass-through of the depreciation of the domestic currency
- the impact of adverse weather-related conditions
- the impact of higher international crude oil prices
- revenue enhancement measures implemented by the government.

The inflation out-turn was, however, tempered by weak domestic demand conditions and lower telephone rates.

At the end of 2013, the exchange rate was $106.38 per US$1.00, representing a nominal depreciation of 12.6 per cent compared with the rate at the end of 2012. Real depreciation for the Jamaica Dollar was 4.4 per cent relative to the end of 2012.

POLICY FRAMEWORK

Monetary policy was guided by the GOJ's Memorandum of Economic and Financial Policies (MEFP), which accompanied its Letter of Intent to the IMF. This MEFP outlined a comprehensive economic programme for FY 2013/14–FY 2016/17, which was underpinned by the four-year EFF with the IMF. The objective of the programme is to create an environment for sustainable growth through five main pillars, namely: (i) structural reforms to enhance growth; (ii) actions to improve price and non-price competitiveness; (iii) fiscal adjustment, supported by extensive reforms; (iv) debt management operations that reduce public debt over time while safeguarding stability in the financial system; and (v) improved social protection programmes to assist the most vulnerable. Prior to undertaking this programme, several actions were implemented, one of which was the NDX. The NDX targeted approximately $860.0 billion of debt issued locally and involved the exchange of bonds denominated in Jamaica Dollar and US-Dollar held by Jamaican residents. This encompassed the issuing of new benchmark notes with lower coupon rates, and in most cases, an extension of three to five years in maturities. Other prior actions included a public sector wage restraint agreement; a new tax package; and approval by Parliament of the Debt Law, which consolidated various debt related acts and helped strengthen debt management.

The objective of monetary policy in the economic programme is to maintain single-digit inflation. The interest rate on the BOJ's 30-day Certificate of Deposit (CD) continued to be the primary instrument of monetary policy during the review year and was adjusted based on the Central Bank's assessment of risks to the inflation target. The conduct of monetary policy will continue within the framework of a managed floating exchange rate regime, in which the rate is permitted to adjust in a systematic manner.

Selected medium-term macroeconomic indicators outlined in the programme for FY 2013/14 were:

- real Gross Domestic Product (GDP) growth within the range of 0.0 per cent to 1.0 per cent
- inflation rate in the range of 8.5 per cent to 10.5 per cent
- Net International Reserves (NIR) of US$1 234.7 million
- fiscal deficit of 0.4 per cent of GDP
- primary surplus of 7.5 per cent of GDP

TABLE 7.1
INTEREST RATES ON BOJ OMO INSTRUMENTS

	Average Rate			
Year	30-day[a]	28-day	91-day	182-day
2012	6.25	6.31	7.67	7.18
2013	5.75	6.25	7.53	8.25

a-The rate was changed on February 25, 2013

Source: Bank of Jamaica

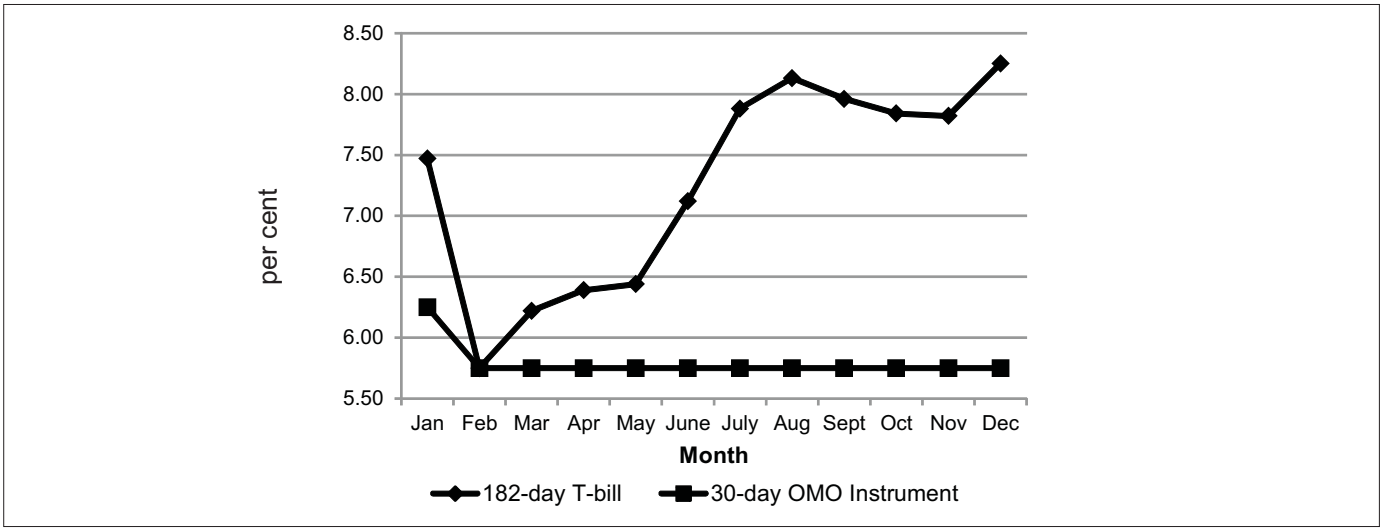

FIGURE 7A: MOVEMENTS IN INDICATIVE INTEREST RATES, 2013

— current account deficit of 10.8 per cent of GDP.

The IMF completed reviews of Jamaica's macroeconomic performance for April–June and July–September during 2013. Jamaica satisfied all the quantitative targets and structural benchmarks outlined in the arrangement under the EFF for both quarters. This facilitated the disbursements of US$30.6 million and US$30.8 million for the respective quarters and resulted in total disbursements of approximately US$268.6 million for the year.

MONETARY POLICY MANAGEMENT

The Central Bank lowered the interest rate on its 30-day CD by 50.0 basis points to 5.75 per cent on February 25, 2013 (Table 7.1 and Figure 7A). The Central Bank's policy action was consistent with the reduction in the interest rate on Government securities consequent on the National Debt Exchange which was completed on February 22, 2013. Subsequently, the BOJ maintained this monetary policy stance for the remainder of 2013. To manage liquidity in the market, the BOJ issued special open market operations instruments to primary dealers and commercial banks. In addition, the BOJ enhanced its liquidity management framework with the introduction of special repurchase agreements to alleviate periodic liquidity constraints faced by deposit-taking institutions. At the end of 2013, the 182-day T-Bill rate was 8.25 per cent relative to 7.18 per cent at the end of 2012 (see Table 7.1). In contrast, the 28-day and 91-day T-bill rates fell to 6.25 per cent and 7.53 per cent compared with 6.31 per cent and 7.67 per cent at the end of 2012, respectively.

The weighted average selling rate of the United States dollar at the end of the year was $106.38 per US$1.00. This represented nominal and real depreciation rates of 12.6 per cent and 4.4 per cent compared with 6.9 per cent and 0.7 per cent for 2012, respectively. The increased pace of depreciation relative to 2012 reflected inadequate levels of private inflows to meet

TABLE 7.2
SUMMARY OF THE MONETARY AUTHORITY'S ACCOUNTS, 2011–2013
$Million

	Stock[a]			Flows			Percentage Change in Stock		
	2011	2012	2013	2011	2012	2013	2011 /10	2012 /11	2013 /12
NIR (US$M)	1 966.1	1 125.6	1 047.8	-205.3	-840.5	-77.8	-9.5	-42.8	-6.9
NIR	175 671.9	100 570.8	98 642.7	-18 343.6	-75 101.1	-1 928.1	-9.5	-42.8	-1.9
NDA	-83 961.8	-2 922.4	4 990.7	24 960.7	81 039.4	7 913.1	22.9	96.5	270.8
Net Claims on Public Sector	96 540.4	137 631.9	163 141.8	-4 833.6	41 091.5	25 509.9	-4.8	42.6	18.5
Net Credit to Banks	-14 167.6	-16 413.6	-21 500.4	-323.4	-2 246.0	- 5 086.8	-2.3	-15.9	-31.0
Open Market Operations	-98 899.9	-47 675.5	-49 948.2	30 280.2	51 224.4	- 2 272.7	-23.4	-51.8	4.8
Other	-67 434.9	-76 465.2	-86 702.6	-162.7	-9 030.3	- 10 237.4	-0.2	-13.4	-13.4
MONETARY BASE	91 710.1	97 648.5	103 633.4	6 617.1	5 938.4	5 984.9	7.8	6.5	6.1
Currency Issue	62 646.7	64 684.1	69 801.7	5 936.0	2 037.4	5 117.6	10.5	3.3	7.9
Cash Reserve	28 822.7	31 808.9	33 593.3	1 109.2	2 986.2	1 784.4	4.0	10.4	5.6
Current A/C	240.7	1 155.5	238.4	-428.1	914.8	-917.1	-64.0	380.1	-79.4

a-End of period

Source: Bank of Jamaica

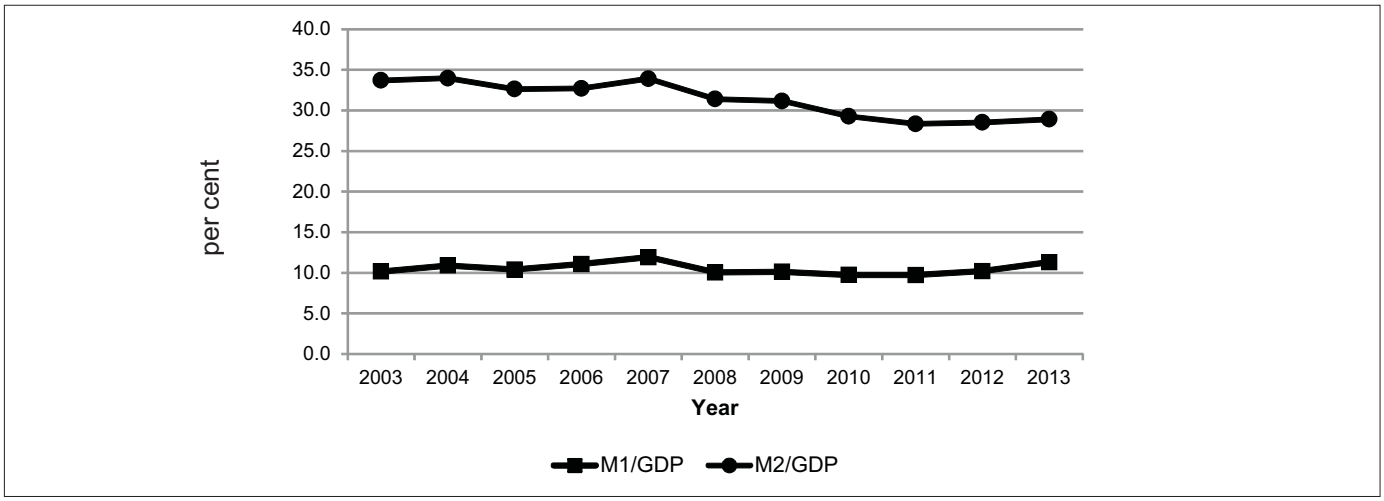

FIGURE 7B: TOTAL LIQUIDITY IN THE ECONOMY, 2003-2013

heightened demand. This increased demand was associated in part with the uncertainty surrounding the terms of and delay in signing an agreement with the IMF during the first half of 2013[1]. Additionally, the decline in the Net International Reserves (NIR) contributed to the unease in the foreign exchange market, which resulted in the further depreciation of the local currency. Net Private Capital (NPC) inflows were not sufficient to cover higher net demand for current account transactions, which resulted in a 6.9 per cent reduction in the NIR.

Monetary Base

At the end of December 2013, the Monetary Base was $103.6 billion, $6.0 billion higher than at the end of December 2012 (Table 7.2). This was the net effect of an improvement of

TABLE 7.3
DETERMINANTS OF MONEY SUPPLY, 2011–2013
$Million

	Stock[a]			Flows			Percentage Change in Stock		
ASSETS	2011	2012[r]	2013[p]	2011	2012	2013	2011/10	2012/11	2013/12
Net Foreign Assets	229 185.1	192 255.5	194 456.5	-10 604.4	-36 929.5	2 200.9	-4.4	-16.1	1.1
Domestic Credit	345 091.5	385 224.4	426 653.9	27 848.8	40 132.9	41 429.5	8.8	11.6	10.8
To Public Sector (net)	128 952.9	130 471.7	132 761.6	-3 313.4	1 518.9	2 289.9	-2.5	1.2	1.8
To Private Sector	235 446.5	276 182.2	318 881.2	26 455.5	40 735.7	42 699.0	12.7	17.3	15.5
To Other Financial Institutions (net)	-19 307.9	-21 429.6	-24 989.0	4 706.6	-2 121.7	-3 559.4	-19.6	11.0	16.6
TOTAL ASSETS	574 276.6	577 480.0	621 110.3	17 244.4	3 203.3	43 630.4	3.1	0.6	7.6
LIABILITIES									
Narrow Money (M1)	120 569.9	133 264.5	148 734.0	8 335.5	12 694.6	15 469.5	7.4	10.5	11.6
Currency	52 853.8	54 734.7	58 641.4	4 337.1	1 880.9	3 906.7	9.0	3.6	7.1
Demand Deposits	67 716.0	78 529.8	90 092.6	3 958.4	10 813.8	11 562.8	6.2	16.0	14.7
Quasi Money	230 848.7	241 202.8	267 219.8	5 418.6	10 354.1	26 017.0	2.4	4.5	10.8
Time Deposits	55 297.9	61 215.6	64 328.3	1 156.5	5 917.7	3 112.7	2.1	10.7	5.1
Saving Deposits	175 550.8	179 987.2	202 891.5	4 262.2	4 436.4	22 904.3	2.5	2.5	12.7
Broad Money (M2)	351 418.5	374 467.3	415 953.8	13 754.1	23 048.8	41 486.5	4.1	6.6	11.1
Other Items (net)	222 858.1	203 012.6	205 156.5	3 490.3	-19 845.4	2 143.9	1.6	-8.9	1.1
TOTAL LIABILITIES	574 276.6	577 480.0	621 110.3	17 244.4	3 203.3	43 630.4	3.1	0.6	7.6

a-End of period
r-revised
p-preliminary

Source: Bank of Jamaica

1 The domestic currency depreciated nominally by 8.3 per cent during January to June 2013. For the latter half of the year, the Jamaica Dollar depreciated nominally by 4.7 per cent.

TABLE 7.4
PERCENTAGE CHANGE IN THE CONSUMER PRICE INDEX BY REGION (POINT-TO-POINT), 2009–2013

	2009	2010	2011	2012	2013
Greater Kingston Metropolitan Area	11.0	13.6	7.0	10.0	9.6
Other Urban Centres	11.6	12.0	5.6	6.9	10.1
Rural Areas	9.1	10.3	5.5	6.9	9.0

Source: Statistical Institute of Jamaica

$7.9 billion in Net Domestic Assets (NDA) and a $1.9 billion decline in the NIR. The expansion in the NDA was partly reflected in the Central Bank's increased holdings of government securities, which contributed to a $25.5 billion growth in Net Claims on Public Sector.

At the end of December 2013, the NIR was US$1 047.8 million, a decline of US$77.8 million relative to December 2012 (see Table 7.2). The reduction in the NIR largely reflected net payments on behalf of the Central Government, the impact of which was partly offset by net purchases of foreign currency by the BOJ. Gross International Reserves amounted to US$1 817.6 million as at December 31, 2013 and represented 12.6 weeks of estimated goods and services imports relative to 13.2 weeks at the end of 2012.

The expansion in the Monetary Base was reflected in respective increases of $5.1 billion and $1.8 billion in net Currency Issue and commercial banks' Cash Reserves (see Table 7.2) A decline of $0.9 billion in the current account of commercial banks to $0.2 billion partly offset the higher monetary base.

Money Supply

Total Assets of the banking system increased by 7.6 per cent to $621.1 billion (Table 7.3). This was due to increases of 1.1 per cent and 10.8 per cent in Net Foreign Assets and Domestic Credit, respectively. The higher stock of Domestic Credit reflected the increased credit extended to the Public Sector (up 1.8 per cent to $132.8 billion) and the Private Sector (up 15.5 per cent to $318.9 billion).

The 7.6 per cent increase in Total Liabilities represented the combined effect of: Currency (up 7.1 per cent to $58.6 billion); Demand Deposits (up 14.7 per cent to $90.1 billion); Time Deposits (up 5.1 per cent to $64.3 billion); Saving Deposits (up 12.7 per cent to $202.9 billion); and Other Items (up 1.1 per cent to $205.2 billion).

Total liquidity in the economy as measured by Broad Money (M2) over GDP was 28.9 per cent relative to 28.5 per cent during 2012. Another measure of liquidity, Narrow Money (M1), increased to 11.3 per cent from 10.2 per cent in 2012. Both indicators were consistent with the BOJ's policy action of lowering its signal rate (30-day OMO) at the beginning of the year.

INFLATION

Consumer Price Index (CPI)

For 2013, the point-to-point inflation as measured by the All Jamaica 'All Divisions' Consumer Price Index was 9.5 per cent relative to 8.0 per cent in 2012 (Table 7.5) {Figure 7C}. The **Food & Non-Alcoholic Beverages**; **Transport**; and **Housing, Water, Electricity, Gas & Other Fuels** divisions accounted for approximately 74.0 per cent of inflation during 2013. The annual average inflation rate was 9.4 per cent, 2.5 percentage points higher than the average rate recorded in 2012. Core inflation[2] stood at 7.0 per cent during 2013 compared with 1.8 per cent in the previous year.

Within the All Jamaica CPI, all three regions recorded increases in prices. Inflation for the Greater Kingston Metropolitan Area was 9.6 per cent relative to 10.0 per cent in 2012. For Other Urban Centres and Rural Areas, the inflation rates were 10.1 per cent and 9.0 per cent, up 3.2 percentage points and 2.1 percentage points, respectively (Table 7.4).

Inflationary impulses during 2013 emanated from both international and domestic sources. International pressures to inflation originated mainly from higher crude oil prices, as grain prices fell. The increase in the West Texas Intermediate (WTI) crude oil price, to which Jamaica's energy prices are linked, stemmed primarily from geo-political conflict in Egypt and Syria; and output disruptions in Iraq and Libya. Lower grain prices resulted mainly from the recovery of production in 2013 against the background of severe drought conditions experienced in the United States of America (USA) during 2012.

Within the domestic environment, inflationary impulses resulted from:

- higher transport-related expenses due to an increase in passenger fares
- some pass-through of the depreciation of the local currency
- the administrative increase in water and sewerage rates
- the impact of adverse weather conditions on domestic food production

2 This measure of inflation excludes the food and fuel components.

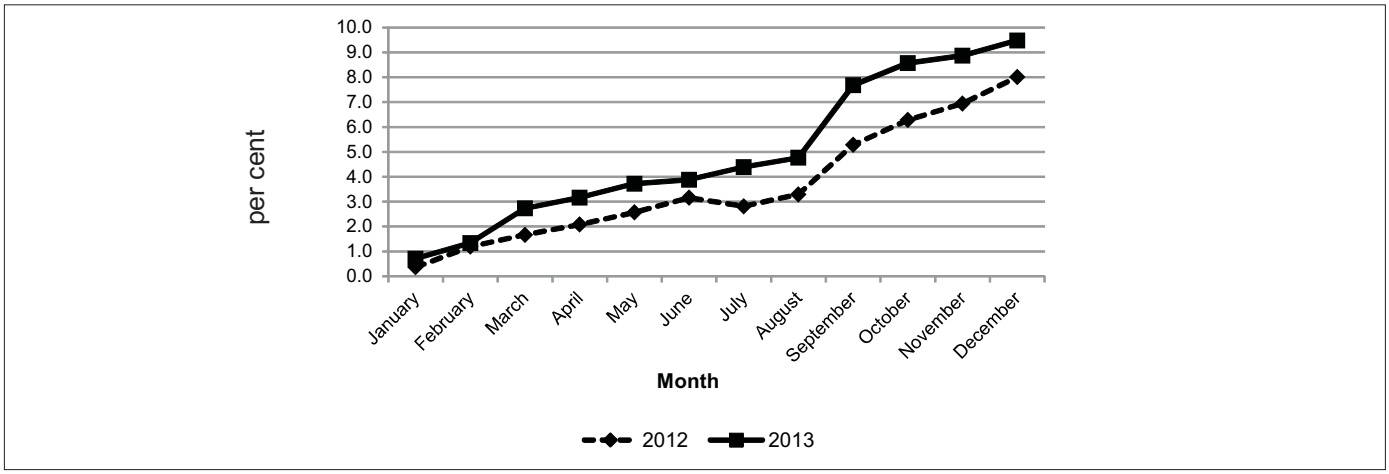

FIGURE 7C: CALENDAR YEAR TO DATE INFLATION, 2012-2013

— the impact of Government's revenue enhancement measures[3]

Prices were, however, tempered by lower telephone rates and subdued domestic demand.

The index for **Food & Non-Alcoholic Beverages** increased by 7.9 per cent and accounted for approximately 31.8 per cent of overall inflation (see Table 7.5 and Figure 7D). This reflected upward movements in the indices for Food (7.7 per cent) and Non-Alcoholic Beverages (11.5 per cent). Within Food, *Meat* (up 7.1 per cent), *Bread & Cereals* (up 7.6 per cent), *Milk, Cheese & Eggs* (up 13.3 per cent) and *Vegetables & Starchy Foods* (up 5.7 per cent) were the largest contributors to the out-turn. The main factors contributing to the higher index for **Food & Non-Alcoholic Beverages** were drought conditions[4] in the major food-producing parishes during January–April 2013. Notably, there was lower production for yam, plantain, cassava and dasheen. Additionally, the increased index for Food emanated from:

— the higher prices for chicken products (chicken and chicken parts), as two of the largest manufacturers raised prices for their products by an average of 2.5 per cent in October 2013 due mainly to the depreciation in the exchange rate

— the shortage of domestically-produced eggs due to the exit of some producers during 2012 as a result of the glut in the market during that year

With respect to Non-Alcoholic Beverages, there were respective increases of 12.6 per cent and 11.0 per cent in the indices for *Coffee, Tea & Cocoa* and *Mineral Waters, Soft Drinks, Fruit & Vegetable Juices*. The higher costs for chocolate, teas, cocoa, fruit juices and vegetable juices, which were associated largely with the depreciation of the domestic currency, were the main contributors to the increased out-turn for Non-Alcoholic Beverages.

The index for the **Alcoholic Beverages & Tobacco** division rose by 11.0 per cent. This increase reflected the higher cost of spirits, wines, beers and tobacco products; stemming mainly from the implementation of the CAF and exchange rate depreciation.

The **Clothing & Footwear** index increased by 9.2 per cent and reflected higher indices for both the *Clothing* and *Footwear* groups. The main contributor to this out-turn was *Clothing*, which increased by 9.9 per cent. There was an 8.1 per cent increase in the index for *Footwear*.

The index for **Housing, Water, Electricity, Gas & Other Fuels** rose by 10.0 per cent. The division accounted for 13.7 per cent of inflation, the third largest contributor to the overall out-turn for 2013 (see Figure 7D). The higher index was due largely to the groups *Electricity, Gas & Other Fuels* and *Water Supply & Miscellaneous Services Relating to the Dwelling*, which increased by 10.4 per cent and 28.7 per cent, respectively. The upturn in the former reflected increases in both the fuel and non-fuel components of electricity bills, which were adjusted to account for higher international crude oil prices and the depreciation of the domestic currency. The higher index for *Water Supply & Miscellaneous Services Relating to the Dwelling* reflected primarily the upward adjustment in water rates by the National Water Commission effective October 3, 2013. An increase of 13.0 per cent was applied to customers using water and sewerage services while there was an 18.0 per cent increase for consumers utilising only water services. Additionally, the increase in water rates was impacted by upward adjustments in the cost for electricity.

The index for **Furnishings, Household Equipment & Routine Household Maintenance** registered an increase of 7.3 per cent (see Table 7.5). All six groups within this division recorded increases, with the largest contributor being *Goods & Services for Routine Household Maintenance*[5] (up 6.8 per cent).

3 A Customs Administration Fee (CAF) on all imports except for charitable organisations and for the bauxite and alumina sub-industry came into effect on April 1, 2013.

4 Rainfall for January to April 2013 was 62.3 per cent of the 30-year average (1971-2000).

5 This category includes Non-durable Household Goods such as cleaning materials and Domestic Services & Household Services such as day's workers and general household help.

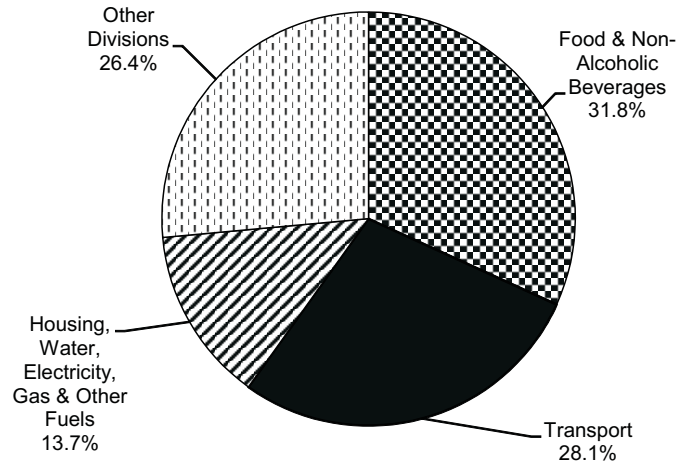

FIGURE 7D: PERCENTAGE CONTRIBUTION TO INFLATION, 2013

The **Health** index recorded an increase of 5.9 per cent. This reflected higher indices of 6.7 per cent and 5.4 per cent for *Medical Products, Appliances & Equipment*[6] and *Health Services*, respectively. Notably, there were increased prices for medical services, laboratory fees and pharmaceutical products.

Transport-related expenses increased by 20.4 per cent and accounted for 28.1 per cent of inflation (see Table 7.5 and Figure 7D). This out-turn was attributable to the higher cost for: (i) public passenger transportation, which rose by 25.0 per cent effective August 25, 2013; (ii) new motor vehicles; (iii) motor vehicle tyres; (iv) petrol, which was associated with higher international crude oil prices; (v) parts, accessories and lubricants used in personal transport equipment; and (vi) batteries.

The **Communication** index fell by 4.2 per cent. The lower index emanated from: (i) the reduction in the mobile telecommunications termination rate to $1.10 from $5.00 by the Office of Utilities Regulation effective July 1, 2013; (ii) one major telecommunications provider reducing its mobile internet charges on August 9, its landline to mobile rate from $3.09 per minute to $2.85 per minute effective October 1, 2013 as well as its prepaid to postpaid landline rates to $0.99 per minute, a decline of $0.51; and (iii) another telecommunications provider eliminating roaming charges across its Caribbean markets effective October 1, 2013.

The index for **Recreation & Culture** rose by 5.9 per cent. This reflected primarily increased prices for: (i) equipment used for recreational purposes such as bicycles; (ii) newspapers; (iii) cinema fees; (iv) gym fees; (v) animal feed; (vi) fertilizers; (vii) stationery, drawing material and books; (viii) computer accessories; and (ix) equipment used in the reception, recording and reproduction of sound and pictures.

Education related expenses increased by 4.0 per cent. This upturn was influenced by higher tuition fees in September for the academic year 2013/14 and the increased cost of examination fees for secondary schools.

The index for **Restaurants & Accommodation Services** rose by 7.8 per cent. This was due to the continued higher cost for food and beverages purchased from restaurants and other places of accommodation. This increase was associated with higher input costs as a result of: (i) the depreciation in the exchange rate; (ii) adverse weather conditions; (iii) higher utility rates; (iv) a rise in transport-related expenses; and (v) revenue enhancement measures implemented by the government.

There was a 10.3 per cent increase in the index for the **Miscellaneous Goods & Services** division. The main contributors to the upturn were: (i) higher prices for personal care items[7] and effects[8]; (ii) the increased cost for funeral services; and (iii) higher legal fees.

Producer Price Index (PPI)[9]

The PPI for the Mining & Quarrying industry increased by 12.6 per cent relative to 5.6 per cent during 2012. For 2013, the PPI for the Manufacture industry increased by 9.3 per cent compared with 4.7 per cent in 2012.The increases in both indices were a consequence of higher production costs, stemming mainly from: the depreciation of the domestic currency; the impact of drought conditions on food crops; the higher cost of cement; and higher international (WTI) oil prices.

The upward movement in the index for Mining & Quarrying was due to increases for the groups *Bauxite Mining & Alumina Processing* (12.9 per cent) and *Other Mining &*

6 Items in this group include spectacles, bandages, cold/fever medicines, family planning supplies and prescription drugs.

7 These items include hair dryer, electric shaver, toothpaste, toothbrush, mouthwash, shampoo, conditioner, deodorant, soap and toilet paper.

8 This group entails jewellery, suitcases, handbags and lighters.

9 The PPI measures the average change in the price received by local suppliers of goods and services over a given time period. It captures the 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 Manufacture industries only.

TABLE 7.5
ANNUAL INFLATION, 2009–2013
(Percentages)

	Point-To-Point					Annual Average				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
ALL DIVISIONS	10.2	11.7	6.0	8.0	9.5	9.6	12.6	7.5	6.9	9.4
FOOD & NON-ALCOHOLIC BEVERAGES	8.1	12.8	5.4	14.3	7.9	13.0	10.1	7.7	10.8	12.5
FOOD	7.9	13.1	5.2	14.7	7.7	13.2	10.1	7.6	10.9	12.6
Bread & Cereals	6.8	6.4	8.2	8.2	7.6	14.4	5.6	8.9	6.4	9.3
Meat	10.1	8.6	9.1	11.7	7.1	13.5	9.3	8.4	10.3	9.4
Fish & Seafood	13.7	10.5	8.1	12.9	4.4	16.0	12.2	8.2	10.9	8.1
Milk, Cheese & Eggs	7.2	9.9	9.3	15.8	13.3	9.3	9.2	10.0	11.9	14.7
Oils & Fats	8.0	11.6	6.7	9.4	11.4	19.3	10.1	8.5	8.2	11.1
Fruit	7.5	12.4	17.0	18.0	20.3	3.7	9.6	16.2	16.3	22.8
Vegetables & Starchy Foods	-0.3	27.5	-8.8	28.4	5.7	10.6	10.5	1.9	14.4	21.9
Sugar, Jam, Honey & Confectionery	21.0	12.2	20.2	7.2	7.5	14.4	20.9	11.5	16.5	6.7
Food Products	16.0	13.1	7.1	10.2	7.3	17.0	15.2	8.8	8.9	8.7
NON-ALCOHOLIC BEVERAGES	11.8	9.1	9.4	8.4	11.5	10.5	10.9	8.7	9.0	11.3
Coffe, Tea & Cocoa	13.2	10.9	16.9	13.0	12.6	9.8	13.0	13.4	14.8	14.4
Mineral Water, Soft Drinks, Fruit & Vegetable Juices	11.4	8.5	6.6	6.6	11.0	10.7	10.1	7.0	6.7	10.0
ALCOHOLIC BEVERAGES & TOBACCO	23.3	14.4	5.1	6.1	11.0	23.5	20.9	5.8	4.7	10.0
CLOTHING & FOOTWEAR	10.6	9.0	8.7	11.6	9.2	10.6	9.8	8.0	10.3	11.3
Clothing	8.5	10.2	10.3	12.0	9.9	8.1	9.7	9.7	11.2	11.8
Footwear	13.6	7.2	6.3	11.1	8.1	14.3	10.0	5.7	9.1	10.5
HOUSING, WATER, ELECTRICITY, GAS & OTHER FUELS	23.0	8.4	12.3	5.3	10.0	2.8	20.6	12.3	5.9	8.3
Rentals for Housing	22.8	21.2	5.5	1.6	1.2	9.3	33.3	5.1	5.4	1.0
Maintenance & Repair of the Dwelling	8.5	10.0	7.2	8.9	14.4	11.7	9.2	7.2	8.3	13.2
Water Supply & Miscellaneous Services Relating to the	16.0	5.9	12.7	6.6	28.7	19.1	13.0	10.4	6.3	15.5
Electricity, Gas & Other Fuels	26.2	2.6	16.5	6.6	10.4	-3.7	17.2	17.3	5.8	10.2
FURNISHINGS, HOUSEHOLD EQUIPMENT & ROUTINE HOUSEHOLD MAINTENANCE	9.8	7.0	7.3	8.6	7.3	11.3	8.4	7.3	7.0	8.8
Furniture & Furnishings, Carpets & Other Floor Coverings	7.5	9.2	9.1	9.5	8.3	11.4	9.3	7.7	10.0	8.7
Household Textiles	5.0	7.8	9.4	9.3	6.6	8.2	6.8	8.0	9.3	9.1
Household Appliances	8.8	10.4	4.8	11.1	8.4	8.4	12.0	5.5	8.1	10.3
Glassware, Tableware & Household Utensils	7.6	7.8	7.1	10.4	7.6	9.6	7.5	7.4	9.1	9.6
Tools & Equipment for House & Garden	6.4	7.2	4.0	4.4	10.0	7.9	7.1	5.1	3.8	7.6
Goods & Services for Routine Household Maintenance	11.2	5.8	7.4	8.0	6.8	12.3	7.8	7.6	6.1	8.5
HEALTH	4.1	2.9	2.5	3.1	5.9	4.9	3.2	2.3	2.9	5.2
Medical Products, Appliances & Equipment	5.8	2.5	2.9	4.3	6.7	5.9	3.6	2.7	3.5	6.1
Health Services	3.0	3.1	2.2	2.4	5.4	4.3	3.0	2.1	2.6	4.7
TRANSPORT	6.2	25.7	3.5	2.5	20.4	4.1	23.9	7.4	2.5	8.3
COMMUNICATION	3.2	5.3	3.1	-39.4	-4.2	1.3	5.9	2.7	-18.4	-25.8
RECREATION & CULTURE	9.6	6.9	3.0	6.6	5.9	9.4	10.5	3.8	5.0	6.6
EDUCATION	6.6	8.0	8.6	3.7	4.0	9.9	7.7	6.6	6.7	3.6
RESTAURANTS & HOTELS	7.2	5.5	2.3	5.3	7.8	9.1	6.4	3.4	3.8	8.0
MISCELLANEOUS GOODS & SERVICES	13.0	8.7	5.5	6.0	10.3	12.4	11.7	6.7	6.1	8.2

Source: Statistical Institute of Jamaica

Quarrying (6.5 per cent). The higher index for Manufacture was influenced mainly by the groups *Food, Beverages & Tobacco* (6.9 per cent); *Refined Petroleum Products* (18.3 per cent); *Chemicals & Chemical Products* (2.3 per cent); and *Other Non-Metallic Mineral Products* (21.0 per cent).

OUTLOOK

Inflation[10] during 2014 is expected to emanate from:

— the depreciation of the Jamaica Dollar against the US-Dollar

— an increase in the national minimum wage from $5,000.00 to $5,600.00 per 40-hour work week[11] which became effective January 6 and the associated adjustments in the salaries of some employees

— the impact of possible drought conditions during the first quarter on the production of some domestic crops.

International commodity prices are forecast to be lower in 2014. Crude oil prices are forecast to be lower as new pipeline capacity planned for the USA will lower the cost of moving mid-continent crude oil to the Gulf Coast refining centers. Additionally, the expected resumption of Iran's supplies to the market by mid-2014; higher non-OPEC production, mainly in North America; and substitution of natural gas for oil are anticipated to contribute to the reduction in the price of crude oil.

With respect to grains, global wheat prices are projected to be lower due to higher ending stocks, particularly for the USA and China. International corn prices are also forecast to be lower as higher production in China is expected to offset lower supplies in the USA, Argentina, Russia and the European Union. Lower supplies in the USA reflect increased usage for feed and ethanol production. Global rice production is projected at a record 471.2 million tonnes, which is expected to lower prices. This increased production is due mainly to higher forecasts for Brazil, Pakistan and the USA. Additionally, world ending stocks are projected higher as production outpaces consumption.

Inflation for January to February 2014 and the fiscal year to date were 0.6 per cent and 7.2 per cent, respectively. The calendar year to date out-turn reflected largely increases in the indices for **Food & Non-Alcoholic Beverages** and **Furnishings, Household Equipment & Routine Household Maintenance**. The higher indices for *Meat* (1.1 per cent) and *Milk, Cheese & Eggs* (2.3 per cent) were the main contributors to the increased prices for items in the **Food & Non-Alcoholic Beverages** division. The increase in the national minimum wage was the primary contributor to the higher index for *Goods & Services for Routine Household Maintenance*. Reductions in the indices for *Vegetables & Starchy Foods* (1.6 per cent) and *Electricity, Gas & Other Fuels* (1.4 per cent) tempered calendar year-to-date inflation.■

10 Inflation for FY 2014/15 is projected at 9.4 per cent. This is the target listed under the medium-term macroeconomic programme.

11 The minimum wage for industrial security guards will also be increased from $7,320.40 to $8,198.80 per 40-hour work week effective January 06, 2014.

CHAPTER 8

FISCAL ACCOUNTS

INTRODUCTION

The objectives of the Medium-Term economic programme guided the preparation of the budget for fiscal year (FY) 2013/2014. These objectives included:

- fiscal consolidation to halt and reverse the debt accumulation process
- debt service reduction through liability management initiatives
- measures to improve competitiveness of goods and services produced in Jamaica to increase exports and accelerate economic growth.

Against this background, the Government of Jamaica (GOJ) approached the Executive Board of the International Monetary Fund (IMF) to enter a four-year Extended Arrangement under the Extended Fund Facility (EFF), which was approved on May 1, 2013. Total disbursements over the four-year period will amount to SDR 615.38 (approximately US$932.3 million or 225.0 per cent of quota).

On December 18, 2013, the IMF announced that Jamaica had passed the second review under the EFF. This facilitated the disbursement of SDR 19.97 million (approximately US$30.8 million) which brought the total amount under the arrangement to SDR 176.69 million (approximately US$272.2 million).

Initiatives were geared towards prudent expenditure management as well as to generate more revenue. The main quantitative targets for FY 2013/14 as established in the macroeconomic programme of the Memorandum of Economic and Financial Policies were:

- economic growth of 0.8 per cent
- inflation rate of 10.5 per cent
- fiscal deficit of 0.4 per cent of GDP
- primary surplus of 7.5 per cent of GDP
- debt stock of 142.5 per cent of GDP.

Central Government operations were programmed to generate a fiscal deficit of $8.0 billion compared with $54.6 billion for FY 2012/13. Revenue & Grants was projected to amount to $407.2 billion for FY 2013/14 which was 18.1 per cent more than the revised out-turn for the previous fiscal year. Tax Revenue was expected to contribute $360.5 billion or 88.5 per cent of Revenue & Grants.

For FY 2013/14, Expenditure (excluding amortization) was budgeted at $415.2 billion, 4.0 per cent more than the revised estimates for FY 2012/13. This projected increase was expected to be driven by non-debt expenditure (up 8.6 per cent) as interest expense was expected to fall by 5.8 per cent. The increase in non-debt expenditure was contingent on an expansion in funds expended for Non-Debt Recurrent (up 7.0 per cent) and Capital Expenditure (up 18.4 per cent). Within Non-Debt Recurrent Expenditure, there was a budgeted increase in allocations for Programmes (up 7.4 per cent) and Wages & Salaries (up 6.7 per cent). The expected decline in Interest payments was due mainly to the impact of the National Debt Exchange (NDX). The NDX, which was launched in February 2013, targeted $860 billion of debt issued in the domestic market. Local investors exchanged their old bonds for

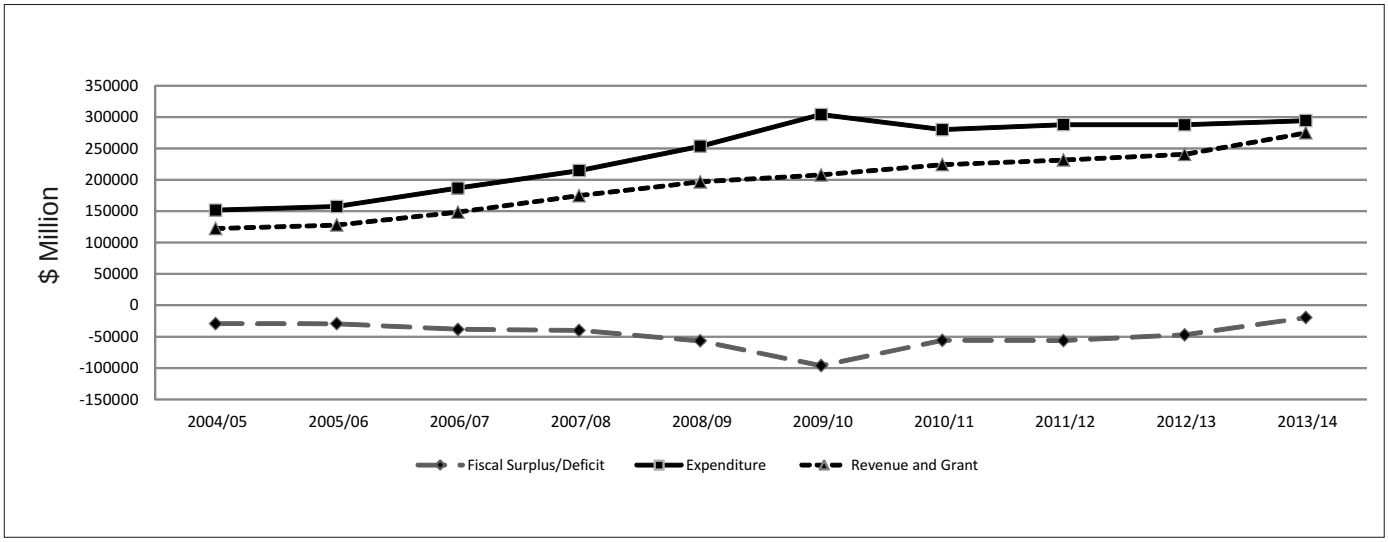

FIGURE 8A: FISCAL EXPENDITURE, REVENUE AND SURPLUS/DEFICIT FOR APRIL - DECEMBER 2004/05 - 2013/14

new bonds with the same face value, but with lower coupon rates and longer maturity period (mainly three to five years longer). Amortization payments were budgeted at $105.7 billion, 19.6 per cent more than the revised total for FY 2012/13. Debt Servicing projected at $225.2 billion represented 43.2 per cent of the total budget compared with 44.1 per cent for the revised estimates for FY2012/13.

Loan receipts at $103.3 billion in FY2013/14 was projected to be $43.8 billion lower than the revised out-turn for FY2012/13. This expected decline in loan receipts reflected the programmed impact of the fiscal consolidation programme.

For the period April – December 2013, Central Government operations generated a fiscal deficit of $19.6 billion, which was $5.2 billion lower than budgeted. This was due to Expenditure (Less Amortization) at $294.2 billion being $16.1 billion lower than budgeted, which outweighed the impact of Revenue & Grants at $274.6 billion being $10.9 billion lower than budgeted. The shortfall in Revenue & Grant was due mainly to lower Tax Revenue which at $242.7 billion was $12.5 billion below budget and Non-Tax Revenue which at $22.3 billion was $3.5 billion lower than budgeted.

FISCAL POLICY AND PROGRAMMES

FISCAL POLICY

The GOJ's medium-term fiscal programme is formulated to promote economic growth through reduction in the fiscal deficit to ensure that it remains at sustainable levels. The strategy will be guided by a simplified and equitable tax system designed to generate adequate revenue. Minimizing debt service costs will increase fiscal space, thereby enabling the government to be more effective in responding to natural disasters and other shocks, as well as,to be more equipped to provide public goods and services, including vital infrastructure.

To support the aforementioned objectives, the GOJ entered into a four-year Extended Fund Facility (EFF) with the IMF. The EFF was signed on May 1, 2013. A total amount of SDR 615.38 (approximately US$932.3 million or 225.0 per cent of quota) will be disbursed over a four-year period. The EFF involves prior actions, quantitative targets and structural benchmarks, which included:

Prior Actions

- Passage of the Public Debt Management Act by Parliament
- Reform of tax policy and tax administration to enhance revenue collection & efficiency
- Wage Restraint Agreement with unions representing at least 70.0 per cent of public sector workers
- National Debt Exchange (NDX) to secure fiscal savings

Quantitative Targets and Structural Benchmarks

- An average primary surplus of 7.5 per cent of GDP over the life of the EFF
- Debt/GDP ratio of 96.0 per cent by FY 2019/20
- Legislative and regulatory reforms to reduce systemic risks to the budget and financial
- system and to strengthen the overall resilience of the economy
- Enhancement of the social safety net to protect the poor and vulnerable.

Debt Management Strategy

The key component outlined in the Medium-Term Debt Management Strategy FY2010/11 – 2014/15, seeks to reduce the cost of debt and to ensure that the prudent debt structure is consistent with the Government's tolerance for financial risk. The Debt Strategy has been identified as a vital element of the Fiscal Responsibility Framework to support the long-term sustainability of the public debt.

Central Treasury Management System (CTMS)

The CTMS, which enables the Accountant General's Department (AG) to assume full responsibility for the handling of Government's cash, continued to incorporate more Ministries, Departments and Executive Agencies in 2013. This initiative will enable the government to:

- operate with a reduced number of accounts in order to improve cash management
- eliminate idle balances
- Effectively control and monitor funds allocated.

Tax Reform

The GOJ has undertaken initiatives to simplify the tax system, reduce economic distortions, eliminate ministerial discretion in the granting of incentives, broaden the tax base and reduce rates. The new system is expected to generate an adequate source of revenue for the treasury as well as reduce the cost of compliance. Key components of the tax reform include:

- *Charities Bill* – The Bill was passed in both Houses of Parliament in November 2013. It seeks to provide a wide-ranging regulatory framework that will address the registration process as well as enhance transparency guidelines to ensure that Charities are not used for money-laundering practices.
- *Omnibus Incentive Regime* (the Fiscal Incentives Bill and the Income Tax Relief (Large-scale Projects and Pioneer Industries) Bill) – the Omnibus legislation intends to establish a transparent system to manage all tax incentives. Incentives are to be linked to macroeconomic indicators and should be based on performance. Moreover, incentives that are approved will be published for public knowledge.
- *Tax Arrears Write-off Regime* – The tax Administration of Jamaica (TAJ) will compile the comprehensive tax arrears listing that will be the subject of several scenarios to identify the most cost effective option for the one-time write-off of uncollectable tax arrears.
- *Broader Tax Reform* – intended to track all the tax laws that will be amended as part of the broader tax reform as well as administrative changes to Jamaica Customs Agency (JCA) and TAJ

Fiscal Rule

Cabinet approved a conceptual framework which seeks to limit fiscal deficits in order to attain a debt/GDP ratio of 60 per cent or less by the end of FY 2025/26. A key feature identified is

TABLE 8.1a
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, 2009/10 - 2013/14
($ Million)

		Apr-Dec 2009/2010	Apr-Dec 2010/2011	Apr-Dec 2011/2012	Apr-Dec 2012/2013	Apr-Dec 2013/2014	Budget Apr-Dec 2013/2014	% Change FY 13/14 - Budget
i	Revenue & Grants	207 564.0	223 941.1	231 370.2	240 106.0	274 619.4	285 547.3	-3.8
	Tax Revenue	185 876.0	196 355.7	206 269.9	224 840.7	242 653.2	255 161.3	-4.9
	Non-Tax Revenue	13,061.8	16 571.4	12 127.5	12 259.1	22 264.7	25 728.8	-13.5
	Bauxite Levy	1,504.8	189.2	1 169.1	882.7	884.3	1 030.3	-14.2
	Capital Revenue	1,360.3	1 809.4	8 493.1	501.8	529.3	593.1	-10.8
	Grants	5,761.1	9 015.4	3 310.5	1 621.8	8 287.9	3 033.8	173.2
ii	Expenditure	303 854.0	279 916.7	287 740.1	287 618.4	294 235.1	310 328.7	-5.2
	Recurrent Expenditure	280 134.2	239 793.8	251 917.9	265 101.0	270 252.8	277 290.4	-2.5
	Programmes	53 183.9	55 017.3	63 292.5	66 038.0	69 160.9	69 894.3	-1.0
	Wages & Salaries	94 192.6	96 480.9	105 680.4	112 787.3	119 786.8	121 014.8	-1.0
iii	Interest	132 757.8	88 295.7	82 945.0	86 275.7	81 305.2	86 381.3	-5.9
	Domestic	96 991.7	56 111.5	49 967.1	53 411.1	46 980.0	51 360.9	-8.5
	External	35 766.1	32 184.2	32 977.9	32 864.6	34 325.2	35 020.4	-2.0
	Capital Expenditure	23 719.8	40 122.9	35 822.2	22 517.4	23 982.3	33 038.3	-27.4
	Capital Programmes	23 719.8	40 122.9	35 822.2	22 517.4	23 982.3	33 038.3	-27.4
iv	Fiscal Balance (Surplus + / Deficit -) (i - ii) (Excludes Amortisation Payments)	-96 290.1	-55 975.0	-56 369.0	-47 512.4	-19 615.7	-24 781.4	-20.8
v	Primary Surplus/Deficit (i - ii + iii)	36 467.8	32 320.1	26 575.1	38 763.4	61 689.5	61 599.9	0.1
vi	Loan Receipts	198,211.3	140 102.1	112 165.4	102 809.9	54 555.2	56 002.6	-2.6
	External	13,222.4	49 506.7	18 593.0	6 594.4	36 704.2	45 595.2	-19.5
	Domestic	184,989.0	90 595.5	93 572.4	96 215.5	17 851.0	10 407.4	71.5
vii	Divestment							
viii	Amortisation	102 033.2	73 147.7	80 437.2	68 528.5	35 487.0	35 830.7	-1.0
	External	18 978.8	16 623.5	52 241.6	42 633.9	22 294.7	22 198.6	0.4
	Domestic	83 054.4	56 524.2	28 195.7	25 894.6	13 192.2	13 632.2	-3.2
ix	Overall Balance (Surplus +/Deficit -) - includes loan receipts and amortisation payments (iv + vi - viii)	-111.9	11 629.2	-24 641.8	-13 231.0	-547.5	-4 609.6	-88.1
	Memo Items							
	Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	-73 930.5	-17 662.1	-29 040.8	-25 496.8	3 837.3	7 663.8	-49.9
	Debt Servicing (iii + viii)	234 791.0	161 443.4	163 382.2	154 804.2	116 792.1	122 212.1	-4.4
	External	54 744.9	48 807.7	85 219.5	75 498.5	56 619.9	57 219.0	-1.0
	Domestic	180 046.1	112 635.7	78 162.8	79 305.7	60 172.2	64 993.1	-7.4

p - preliminary
r - revised

Source: Ministry of Finance and Planning

an automatic correction mechanism. Important steps to ensure that the fiscal rule can take effect in FY 2014/15 included:

- an extensive public information campaign on the objectives of a new fiscal rule
- the development of mechanisms to effectively monitor possible fiscal costs and contingencies with possible PPPs
- the consideration of legal options to enhance the credibility of fiscal rules.

Wage Restraint

The Wage Restraint Agreement signed with unions in March 2013, covered more than 82.0 per cent of the public sector, well in excess of the prior action threshold of 70.0 per cent under the EFF. This agreement is expected to contribute to the achievement of the government's wage target of 9.0 per cent of GDP by March 2016. The annual targets for FY 2013/14 and FY 2014/15 are 10.6 per cent and 9.7 per cent, respectively. The reduction in the wage bill is supported by:

- a wage freeze for the period 2012-2015
- no net hiring of workers over the medium-term
- filling only critical vacancies.

Pension Reform

To guarantee that the pension system is sustainable, the GOJ, with technical support from the World Bank, formulated a white paper on pension reform which was approved by Cabinet and tabled in Parliament. The new public sector pension system, which seeks to improve monitoring arrangements and to more effectively manage public pensions, is projected to be implemented on April 1, 2016. Of note, all workers[1] will be required to make a contribution of 5.0 per cent of their salaries.

PUBLIC BODIES

The group of 65 Public Bodies was expected to generate an overall deficit of $1 366.2 million for FY 2013/14. Expenditure on infrastructure/investments was projected to exceed $55.0 billion compared with $39.9 billion for FY 2012/13.

FISCAL PROGRAMMES

Revenue & Grants

For FY 2013/2014, Revenue & Grants projected at $407.2 billion was 18.1 per cent more than the amount collected in FY 2012/13. This total represented 27.3 per cent of projected GDP relative to 25.8 per cent in the previous fiscal year. Tax Revenue of $360.5 billion was budgeted to increase by 12.7 per cent compared with collections from FY 2012/13 (Table 8.1b). Additional revenue measures to support fiscal consolidation were implemented in March and April 2013. These measures included:

- the Special Telephone Call Tax (STCT) and all fees and taxes paid at the port being part of the GCT base
- increasing the Education Tax by 0.5 percentage point and 0.25 percentage point for employers and employees, respectively
- increasing the Tax on Dividend from 5.0 per cent to 15.0 per cent
- modifications to the fee structure and gross profit tax for the Betting, Gaming and Lotteries sector.

Expenditure

For FY2013/14, the Central Government's budgeted Expenditure (including Amortization) amounted to $520.9 billion, comprising Non-Debt expenditure of $295.6 billion and Debt Servicing of $225.2 billion, representing an increase of 8.6 per cent and 4.6 per cent, respectively, relative to the revised spending for FY2012/13. The increase in Non-Debt expenditure relative to the revised estimates for FY2012/13 was driven by projected higher expenditure in all Non-Debt expenditure subcategories: Wages & Salaries at $157.3 billion (up $9.9 billion); Programmes at $93.7 (up $6.5 billion); and Capital at $44.7 billion (up $ 7.0 billion){see Table 8.1b}. Major provisions within Capital included:

- Decentralization and expanded access to National Training Systems - $7.5 billion
- Integrated Social Protection and Labour Programme - $4.4 billion
- Sugar Transformation Project (including Agro Parks) - $2.0 billion
- Palisadoes Shoreline Protection & Rehabilitation - $1.3 billion
- School Feeding Programme (excluding PATH) – $1.2 billion.

Higher debt servicing relative to the revised estimates for FY2012/13 reflected higher amortization at $105.7 billion (up 19.6 per cent), which outweighed the fall in interest expense, down 5.8 per cent to $119.6 billion.

Financing

For FY 2013/14, Central Government's borrowing was budgeted at $103.3 billion. These borrowings were programmed to finance the deficit as well as to cover amortization payments. Loan Receipts of $13.8 billion was expected to be raised locally (largely Treasury Bills rollovers) while $89.5 billion was programmed to be received from external sources through policy loans from international financial institutions and project/investment loans. The borrowing profile for FY 2013/14 denotes a 28.5 per cent decline in loan receipts relative to the previous fiscal year.

FUNCTIONAL CLASSIFICATION OF EXPENDITURE

Education, National Security and Health were the main priority areas and accounted for 33.1 per cent ($172.6 billion) of the total budget (Figure 8b). Moreover, these three services accounted for 58.4 per cent of non-debt expenditure.

1 Currently, civil servants are not part of a contributory pension scheme

TABLE 8.1b
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, 2009/10- 2013/14
($ Million)

		2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	Budget 2013/2014
i	Revenue & Grants	300 193.3	314 588.5	322 457.3	344 677.7	397 564.6	407 160.3
	Tax Revenue	265 860.2	279 874.2	289 882.2	319 764.9	344 673.3	360 517.6
	Non-Tax Revenue	21 245.5	20 473.9	17 016.7	18 765.1	39 339.1	34 553.2
	Bauxite Levy	1 582.1	421.1	1 524.5	1 163.7	1 279.4	1 540.2
	Capital Revenue	5 208.8	3 664.5	10 585.1	1 015.8	888.3	1 127.0
	Grants	6 296.7	10 124.8	3 448.8	3 968.3	11 384.5	9 422.3
ii	Expenditure	421,458.5	388 768.0	403 191.6	399 278.9	395 469.6	415 206.0
	Recurrent Expenditure	387 044.2	333 173.9	349 960.7	361 521.0	358 276.3	370 484.2
	Programmes	72 042.2	76 862.5	89 699.4	87 201.5	91 524.4	93 664.2
	Wages & Salaries	126 286.4	127 956.7	139 556.9	147 381.8	157 302.9	157 253.3
iii	Interest	188 715.6	128 354.7	120 704.4	126 937.7	109 449.0	119 566.7
	Domestic	144 869.1	88 049.5	81 617.3	87 729.1	68 420.1	75 523.1
	External	43 846.5	40 305.2	39 087.1	39 208.6	41 028.9	44 043.6
	Capital Expenditure	34 414.3	55 594.1	53 230.9	37 757.9	37 193.3	44 721.8
	IMF #1 a/c	0.0	0.0	0.0	0.0	0.0	0.0
	Capital Programmes	34 414.3	55 594.1	53 230.9	3 757.9	37 193.3	44 721.8
iv	Fiscal Balance (Surplus + / Deficit -) (i - ii) (Excludes Amortisation Payments)	-121 265.2	-74 209.5	-80 734.2	54 601.2	2 095.0	-8 045.7
v	Primary Surplus/Deficit (i - ii + iii)	67 450.3	54 145.2	39 970.1	72 336.5	111 544.0	111 521.0
vi	Loan Receipts	299 599.6	212 968.9	163 519.2	144 347.1	96 274.2	103 279.6
	External	50 818.1	90 490.2	20 768.2	10 276.9	56 294.4	89 502.1
	Domestic	248 781.5	122 478.7	142 751.1	134 070.2	39 979.8	13 777.5
vii	Divestment	0.0	1 442.5	0.0	0.0	0.0	0.0
viii	Amortisation	169 514.0	102 157.5	128 373.2	88 329.8	105 240.3	105 680.4
	External	25 533.1	22 764.0	60 553.0	51 235.0	28 821.4	29 293.0
	Domestic	143 980.9	79 393.5	67 820.3	37 094.8	76 418.9	76 387.4
ix	Overall Balance (Surplus +/Deficit -) - includes loan receipts and amortisation payments (iv + vi - viii)	8 820.4	38 084.5	-45 588.3	-8 287.2	-6 871.1	-10,446.5
	Memo Items						
	Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	-80 732.9	-22 279.9	-38 088.5	-17 859.1	38 400.0	35 549.1
	Debt Servicing (iii + viii)	358 229.6	230 512.2	249 077.6	215 267.5	214 689.3	225 247.1
	External	69 379.6	63 069.2	59 855.3	90 443.6	69 850.3	73 336.6
	Domestic	288 850.0	167 443.0	149 437.6	124 823.9	144 839.0	151 910.5

p - Data for the period April 2012 - February 2013

Source: Ministry of Finance and Planning

Allocations for Education amounted to $81.2 billion, 1.0 per cent lower than the total for FY 2012/13. Education accounted for 15.6 per cent of total budget compared with 13.6 per cent for FY 2012/13. Of the total allocations, $76.1 billion was for recurrent while $5.2 billion was for capital.

Security Services was allocated $54.6 billion, 1.3 per cent less than for FY 2012/13. Total allocations for Security Services accounted for 10.5 per cent of total budget and 18.5 per cent of non-debt budget. The allocations for Security Services were disaggregated as follows:

- Police – $32.6 billion
- Jamaica Defence Force - $12.1 billion
- Justice – $5.0 billion
- Correctional Services – $5.0 billion

Health was allocated $36.8 billion relative to $36.4 billion for FY 2012/13. This figure accounted for 7.1 per cent of total budget and 12.5 per cent of non-debt budget.

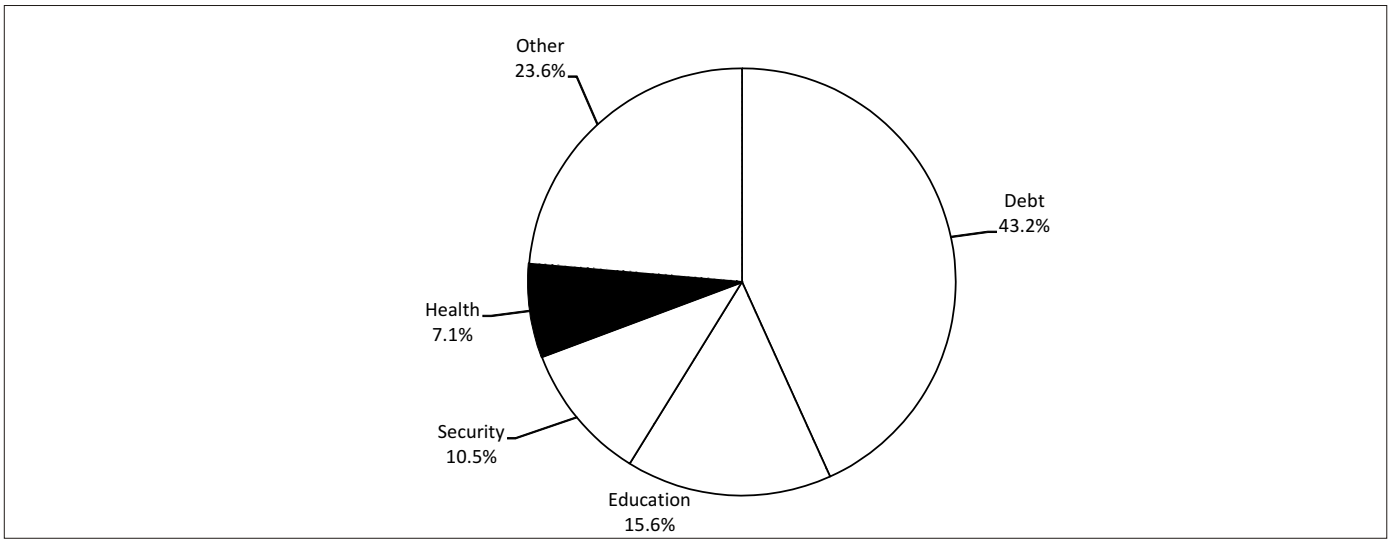

FIGURE 8B: BUDGETARY ALLOCATION FY2013/14

FISCAL PERFORMANCE

Budget versus Actual Outcome

For April – December 2013, Central Government operations incurred a fiscal deficit of $19.6 billion compared with a budgeted deficit of $24.8 billion. This out-turn reflected lower than planned Expenditure which outweighed the shortfall in Revenue & Grants (Table 8.1a). The fall in Revenue & Grants, relative to budget was attributed to declines in collections from Tax Revenue, Non-Tax Revenue, Bauxite Levy and Capital Revenue. Additionally, a primary surplus of $61.7 billion was recorded, $0.1 billion more than the budgeted surplus.

Tax Revenue amounted to $242.7 billion, 4.9 per cent less than budgeted. The shortfall was attributed to a lower collections from Income and Profits; Environmental Levy; Production and Consumption; and International Trade (Table 8.3a).

Taxes from Income & Profit ($71.3 billion) were 6.8 per cent less (relative to budget) as all the components underperformed in tax collection. Of note, PAYE recorded the largest shortfall of $2.7 billion which was attributed partly to lower employment levels in some sectors and less than expected collections from compliance effort. In addition, the Tax on dividend ($1.0 billion less than budgeted) was largely attributable to the change in tax regime on dividends (where the tax rate was increased from 5.0 per cent to 15.0 per cent effective April 1, 2013) which influenced companies to pay dividends earlier than anticipated. Tax on Dividends actually surpassed projections in FY 2012/13.

Special Telephone Call Tax in FY 2012/2013 continued to generate additional income for the government as the number of minutes sold to consumers increased.

Collections from International Trade were attributed mainly to higher intake from Custom Duty, Stamp Duty, Travel Tax and GCT-Imports. The increased revenue generated from the aforementioned subcategories was positively impacted by the nominal depreciation in the Jamaican dollar as well as the tax measures introduced in April 2013.

The decline in Income and Profits tax was due to a reduction in Tax on Interest and Other Companies. Higher payment of refunds and lower interest payments contributed to the lower net inflows from Tax on Interest. Other Companies decreased as a result of lower than expected profits, as well as the fact that there were significant one-off collections from payment of arrears in 2012/13.

For April- December 2013, Expenditure (less Amortization) grew by 2.3 per cent relative to the out-turn for the corresponding period of 2012. The increased spending was attributed to the rise in both Recurrent Expenditure and Capital Expenditure. The increase in Recurrent Expenditure was driven partly by higher Wages & Salaries, up $7.0 billion compared with April–December 2012. The increased Recurrent Expenditure was, however, tempered by a decline in interest payments (down 5.9 per cent) due to a decrease in the domestic component associated with the NDX.

Financing

Loan Receipts for April–December 2013 amounted to $54.6 billion, 2.6 per cent lower than budgeted and 46.9 per cent less than the out-turn for the corresponding period of 2012, as the fiscal deficit in 2013 was significantly less than in 2012. The lower than planned loan receipts were due to a shortfall in external borrowing (down 19.5 per cent) as domestic borrowing rose by 71.5 per cent.

Amortization payments ($35.5 billion) were 1.0 per cent less than budgeted and 48.2 per cent lower than similar payments for the period April – December 2012. Relative to budget, the lower out-turn was due to the combined effect of Domestic payments being 3.2 per cent less than expected and External payments being 0.4 per cent higher than anticipated.

Debt Stock

At the end of 2013, the stock of debt was $1 938.2 billion, 9.9 per cent higher than the stock at the end of 2012. The rise in the stock of debt was due to an increase in the external and domestic components.

At the end of 2013, the domestic debt stock was $1 054.2 billion, representing an increase of 5.9 per cent relative to the end of 2012. The following NDX Benchmark Notes were introduced:

– Fixed Rate Notes - $413.4 billion

TABLE 8.2
FUNCTIONAL CLASSIFICATION OF RECURRENT AND CAPITAL EXPENDITURE
FY 2008/2009 - 2013/2014
$ Million

	2008/09 Total	2009/10 Total	2010/11 Total	2011/12 Total	2012/13 Total	2013/14 Total
A. GENERAL SERVICES						
1 General Administration						
State Services	1 622.9	1 757.2	1 926.5	1 868.0	1 868.1	2 029.3
Public Debt Management	268 252.1	357 374.0	231 219.1	248 774.1	334 703.7	225 247.2
Foreign Services	2 610.4	2 378.6	2 741.0	2 657.9	2 810.3	3 244.2
Personnel Administration	3 178.3	2 984.5	3 490.8	3 610.0	4 061.9	4 153.5
Economic & Fiscal Management	9 868.6	9 404.7	9 625.9	11 693.5	11 142.4	15 391.7
Other General Services	17 934.8	19 451.0	22 777.6	32 272.4	31 583.4	32 781.5
Total General Administration	303 467.1	393 350.0	271 780.9	300 875.9	386 169.8	282 847.4
2 Security Services						
Defence	10 677.5	9 895.6	10 138.1	11 925.5	11 141.0	12 124.4
Justice	3 757.6	2 720.9	3 070.8	3 801.6	4 654.8	4 979.4
Police	27 274.0	25 569.9	27 374.0	31 568.9	32 155.8	32 550.6
Correctional Services	3 750.4	3 844.8	4 360.4	4 689.6	4 645.2	4 910.4
Total Security Services	45 459.5	42 031.2	44 943.3	51 985.6	52 596.8	54 564.8
TOTAL A - General Services	**348 926.6**	**435 381.2**	**316 724.2**	**352 861.5**	**438 766.6**	**337 412.2**
B. SOCIAL AND COMMUNITY SERVICES						
1 Education and Cultural Development	63 776.9	73 027.4	71 287.5	76 601.4	76 654.1	81 223.9
2 Health	28 859.0	30 244.1	34 626.6	37 384.1	34 912.7	36 794.0
3 Social Security and General Welfare	5 061.3	5 864.2	7 070.8	7 259.0	7 623.3	8 674.6
4 Housing	369.9	284.3	604.2	1739.5	1626.5	1 716.0
5 Water Supplies	2008	1 732.8	2 065.2	1 307.1	1 578.2	1 203.9
6 Information and Broadcasting	714.6	578.9	553.3	633	607.5	745.2
7 Other Social and Community Services	7 624.6	6 703.4	6 582.3	7 633.2	6 836.9	7 353.9
TOTAL B - Social and Community Services	**108 414.3**	**118 435.1**	**122 789.9**	**132 557.3**	**129 839.2**	**137 711.5**
C. ECONOMIC SERVICES						
1 Agriculture	7 670.2	8 463.4	7 970.5	12 339.4	10 124.8	9 409.6
2 Industry and Commerce	2 173.2	1 765.9	1 740.3	1 906.4	1 914.9	2 110.3
3 Transport and Communication	4 456.5	4 915.5	31 173.8	11 175.8	7 191.8	6 526.6
4 Roads	11 384.3	6 568.8	10 509.7	13 493.7	14 322.4	14 755.8
5 Fuel and Power	3 426.5	8 496.4	464.2	6 218.9	1 664.6	1 067.8
6 Environmental Protection	690.2	614.2	712.1	937.1	1 165.9	1 257.6
7 Other Economic Services	28 580.1	12 140.6	15 063.2	16 274.9	22 374.8	27 400.1
TOTAL C - Economic Services	**58 381.0**	**42 964.8**	**67 633.8**	**62 346.2**	**58 759.2**	**62 527.8**
D. MISCELLANEOUS SERVICES						
1 Miscellaneous	0.0	0.0	0.0	0.0	0.0	0.0
2 Other Unallocatable Expenditure	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL D - Miscellaneous Services	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
GROSS TOTAL	**515 721.9**	**596 781.1**	**507 147.9**	**547 765.0**	**627 365.0**	**537 651.5**
Less Appropriation-in-Aid	7 749.9	6 073.5	7 122.7	12 317.0	14 936.8	16 764.9
NET TOTAL	**507 972.0**	**590 707.6**	**500 025.2**	**535 448.0**	**612 428.2**	**520 886.6**

Source: Ministry of Finance and Planning
Financial Statement and Revenue Estimates 2012/13

TABLE 8.3a
TAX REVENUE COLLECTIONS, 2009/10 - 2013/14
J$Million

	Apr-Dec 2009/2010	Apr-Dec 2010/2011	Apr-Dec 2011/2012	Apr-Dec 2012/2013[r]	Apr-Dec 2013/2014	Budget Apr-Dec 2013/2014
TOTAL REVENUE & GRANTS	**207,564.0**	**223,941.1**	**231 370.2**	**240 106.0**	**274 619.4**	**285 547.3**
i) TAX REVENUE	185 876.0	196 355.7	206 269.9	224 840.7	242 653.2	255 161.3
Income and Profits	78 789.1	66 410.2	69 344.7	74 459.5	71 283.7	76 445.6
Bauxite/Alumina	19.3	866.3	0.1	0.0	0.0	0.0
Other Companies	14 274.5	16 656.7	16 033.1	19 702.7	18 443.7	19 219.2
PAYE	42 124.4	36 983.1	44 282.8	44 754.2	46 049.6	48 707.7
Tax on Dividend	218.8	727.5	723.0	996.8	1 027.8	2 036.5
Other Individuals	1 696.3	1 771.8	1 710.1	1 601.7	1 689.9	2 195.1
Tax on Interest	20 455.9	9 404.8	6 596.2	7 404.2	4 072.8	4 287.2
Environmental Levy	1 641.7	1,561.6	1 738.8	1 523.2	1 560.2	1 677.3
Production and Consumption	50 464.6	56 866.4	62 382.5	70 305.1	84 284.8	85 799.1
SCT	3 520.0	6 009.4	6 764.1	8 741.5	8 433.3	8 505.0
Motor Vehicle Licenses	1 277.2	1 329.4	1 294.7	1 599.5	1 908.6	1 719.6
Other Licenses	364.6	182.0	268.6	241.0	259.0	250.5
Betting, Gaming and Lottery	1 087.6	1 109.6	1 163.0	1 415.5	1 726.2	2 715.8
Accommodation Tax	0.0	0.0	0.0	265.2	1 290.9	868.7
Education Tax	8 855.3	9 361.1	10 963.4	10 870.0	13 080.7	14 071.1
Telephone and Telex	0.0	0.0	0.0	2 342.1	4 924.2	4 184.4
Contractors Levy	588.9	582.8	928.7	955.1	752.3	1 086.2
GCT(Local)	30 069.7	33 769.3	35 167.7	38 157.8	44 734.4	44 340.5
Stamp Duty(Local)	4 701.3	4 522.7	5 832.4	5 717.4	7 175.1	8 057.3
International Trade	54 988.7	71 517.6	72 804.3	78 552.8	85 524.6	91 239.2
Customs Duty	14 796.9	15 762.2	15 911.9	18 047.3	19 571.3	22 036.9
Stamp Duty	920.8	998.4	1 048.6	1 212.9	1 485.6	1 330.7
Travel Tax	1 261.3	2 838.1	4 158.5	3 835.1	6 969.6	4 637.4
GCT(Imports)	20 833.6	29 284.2	31 695.5	34 079.5	38 764.5	40 718.8
SCT (Imports)	17 168.0	22 634.7	19 989.8	21 378.0	18 733.6	22 515.6
ii) NON-TAX REVENUE	13 061.8	16 571.4	12 127.5	12 259.1	22 264.7	25 728.8
iii) BAUXITE LEVY	1 504.8	189.2	1 169.1	882.7	884.3	1 030.3
iv) CAPITAL REVENUE	1 360.3	1 809.4	8 493.1	501.8	529.3	593.1
v) GRANTS	5 761.1	9 015.4	3 310.5	1 621.8	8 287.9	3 033.8

p - preliminary
r - revised

Source: Ministry of Finance and Planning

– Variable Rate Notes – $334.9 billion

– CPI Notes - $39.9 billion

– USD Notes – $70.6 billion

The JDX Benchmark Notes, compared with the end of 2012, declined partly as a result of the introduction of the NDX as follows:

– Fixed Rate Notes - down 96.0 per cent to $13.5 billion

– Variable Rate Notes – down 99.9 per cent to $69.7 million

– CPI Notes - down 99.9 per cent to $4.9 million

– USD Notes – down 47.9 per cent to 45.0 billion

The external debt stock at US$8.3 billion was 0.7 per cent higher than at the end of 2012. The large stock was attributed to an increase in loans received by Multilateral institutions (up 4.4 per cent to US$3.4 billion) and Bilateral institutions (up 6.8 per cent to $0.9 billion) as debt owed to Private Creditors declined by 3.5 per cent to $4.0 billion.

OUTLOOK

Supplementary Budget

The Fiscal Responsibility Framework (Financial Administration and Audit Act) requires the government to formulate a supplementary budget which indicates any changes in operations and seek parliamentary approval. Although there were notable deviations in both Revenue & Grants and

TABLE 8.3b
TAX REVENUE COLLECTIONS, 2009/10 - 2013/14
J$Million

	2009/2010	2010/ 2011	2011/ 2012	2012/2013[r]	Prov. 2013/2014	Budget 2013/2014
TOTAL REVENUE & GRANTS	**300 193.3**	**314 558.5**	**322 457.3**	**344 677.7**	**397 564.5**	**407 160.3**
i) TAX REVENUE	265 860.3	279 874.2	289 882.2	319 764.9	344 673.2	360 517.6
Income and Profits	118 295.7	105 118.7	106 422.9	115 877.1	112 843.1	119 153.6
Bauxite/Alumina	19.3	866.3	1.3	0.0	0.0	0.0
Other Companies	29 842.3	32 480.9	29 035.2	35 798.0	35 385.6	37 008.1
PAYE	55 969.6	51 552.6	60 164.8	60 876.3	64 062.9	66 043.8
Tax on Dividend	550.0	1,032.3	805.8	1 664.2	2 065.8	2 736.5
Other Individuals	3 893.7	4 001.8	3 786.6	4 022.4	4 301.3	5 089.0
Tax on Interest	28 020.8	15 184.9	12 629.2	13 516.2	7 027.5	8 276.2
Environmental Levy	2 082.2	2 040.1	2 318.8	2 122.1	2 277.0	2 346.1
Production and Consumption	70 996.7	78 571.4	84 629.0	96 459.9	114 799.4	117 089.7
SCT	6 678.3	8 647.9	9 238.2	12 457.3	11 876.6	12 754.4
Motor Vehicle Licenses	1 722.2	1 782.7	1 737.7	2 184.2	2 635.6	2 320.6
Other Licenses	452.5	265.5	377.9	342.9	374.4	345.7
Betting, Gaming and Lottery	1 485.5	1 532.8	1 640.8	1 915.0	2 322.1	3 740.0
Accomodation Tax	0.0	0.0	0.0	610.2	1 835.5	1 264.6
Education Tax	12 285.7	13 096.5	14 995.7	15 038.7	18 228.3	19 272.7
Telephone and Telex	0.0	0.0	0.0	3 822.5	6 709.6	5 697.1
Contractors Levy	754.5	793.6	1,171.1	1 293.4	1 119.6	1 427.3
GCT(Local)	41 452.1	46 389.9	47 973.2	50 897.1	60 343.8	59 552.8
Stamp Duty(Local)	6 165.9	6 062.4	7 494.4	7 898.6	9 353.9	10 714.5
International Trade	74 485.7	94 144.0	96 511.6	105 305.7	114 753.7	121 928.2
Customs Duty	18 993.4	20 487.7	20 769.0	24 413.7	26 307.1	28 892.4
Stamp Duty	1 390.5	1 393.2	1 470.3	1 672.2	1 936.2	1 821.7
Travel Tax	1 519.6	3 930.6	5 086.9	5 396.6	9 507.6	6 865.0
GCT(Imports)	35 972.2	38 520.6	41 684.8	45 501.2	51 731.3	53 893.0
SCT (Imports)	26 130.4	29 811.8	27 500.5	28 322.0	25 271.5	30 456.1
ii) NON-TAX REVENUE	21 245.5	20 473.9	17 016.7	18 765.1	39 339.1	34 553.2
iii) BAUXITE LEVY	1 582.1	421.1	1 524.5	1 163.7	1 279.4	1 540.2
iv) CAPITAL REVENUE	5 208.8	3 664.5	10 585.1	1 015.8	888.3	1 127.0
v) GRANTS	6 296.7	10 124.8	3 448.8	3 968.3	11 384.5	9 422.3

p -Data for the period April 2012 - February 2013

Source: Ministry of Finance and Planning

Expenditure, the target primary surplus is in line with what was expected and the fiscal deficit is on course to be better than anticipated.

For FY 2013/14, Revenue & Grants are currently projected to fall by $9.6 billion (or 2.4 per cent) relative to the initially budgeted amount. Tax Revenue, is estimated to be $344.7 billion, approximately $15.8 billion (or 4.4 per cent) lower than initially budgeted. The estimate for Revenue & Grants is $52.9 billion (or 15.3 per cent) more than for FY 2012/13. Tax Revenue is anticipated to increase by $24.9 billion (or 7.8 per cent) compared with the previous fiscal year.

For FY 2013/14, expenditure (excluding amortization) has been revised to $395.5 billion, 19.7 billion (or 4.8 per cent) less than budgeted. This reduction is due mainly to the curtailment of expenditure in response to lower than budgeted revenue as well as lower than expected interest costs. Additionally, expenditure (excluding amortization) is expected to be 1.0 per cent less than the revised estimate for FY 2012/13.

IMF Update

The performance criteria and structural benchmarks that were outlined in the agreement were achieved for end-December 2013 (Third Review). The net international reserves (NIR) adequately exceeded the margin that was targeted. Greater emphasis will be placed on reforms in areas such as the business environment, tax and customs administration, public financial management, securities dealers and the framework for monetary policy. The macroeconomic outlook continues to reflect earlier projections and the indicators to monitor the progress of the financial system has remained largely the same.■

CHAPTER 9

FINANCE & INSURANCE SERVICES INDUSTRY

INTRODUCTION

The Finance & Insurance Services industry grew by an estimated 0.5 per cent relative to 2012 (Figure 9A). The higher value added stemmed largely from the following developments:

— an increase in net interest income at commercial banks

— higher revenue generated from fees, service charges and commission

— an increase in net premium income at insurance companies

— a rise in returns earned from investments.

The interest rate on the Bank of Jamaica's benchmark 30-day Certificate of Deposit (CD) was lowered by 0.5 percentage point to 5.75 per cent in February 2013. This decision was facilitated by the National Debt Exchange (NDX) which resulted in local investors exchanging their old bonds for new bonds with the same face value but with lower coupon rates and a longer maturity period.

The profitability of Commercial Banks was bolstered by a real increase in the stock of Loans & advances[1] which benefited from a rise in the overall level of savings. Personal Consumption, in particular, had the largest impact on the growth of the stock of Loans & Advances. Additionally, the expansion in the loan portfolio resulted in a rise in net interest income as well as higher revenue generated from fees and commission.

The expansion in activities by life and general insurance companies contributed to the growth of the industry. Key indicators, such as net investment income and net premium income, increased year-over-year. Moreover, there was also an increase in funds managed by Insurance Companies, Securities Firms, Unit Trust Management Companies and Others.

The growth of the Finance & Insurance Services industry was, however, stymied by the NDX as companies earned less interest on their investments. Furthermore, the Jamaica Stock Exchange (JSE) Main Market declined by 12.5 per cent.

LEGISLATIVE AND POLICY DEVELOPMENTS

National Debt Exchange (NDX)

The NDX, which was launched in February 2013, is an exchange initiative that targeted $860.0 billion of debt issued in the domestic market. The domestic debt instruments exchanged were domestic bonds (including fixed and variable, and CPI-Indexed bonds) and locally issued United States dollar denominated bonds.

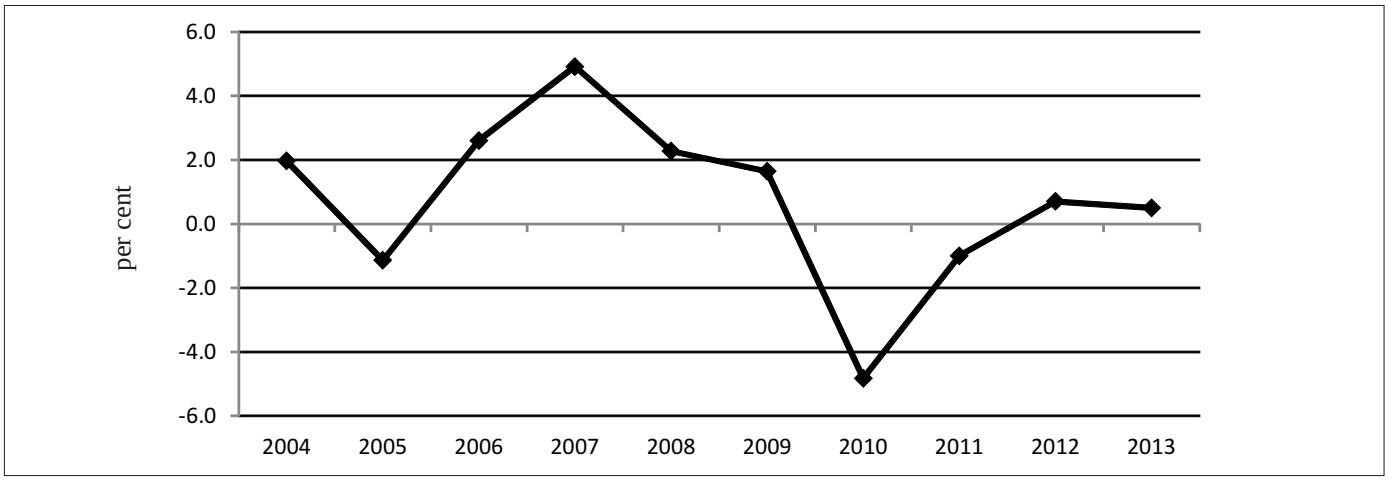

FIGURE 9A: REAL VALUE ADDED GROWTH RATE FOR FINANCE & INSURANCE SERVICES, 2004 - 2013

1 The real increase represents the increase in the stock adjusted for price changes.

In 2013, legislative developments were geared towards formulating policies to spur economic growth and protect the industry from unlawful practices that may hinder progress. To improve the governance of the Finance & Insurance Services industry, efforts were made to strengthen the regulatory framework in order to achieve macroeconomic stability. The main legislative developments in 2013 included:

Financial Investigations Division (Amendment) Act

Amendments to the Financial Investigations Division Act were passed in Parliament in July 2013. The amendments are expected to improve Jamaica's ability to gain membership in the Egmont Group[2]. It is intended to address money laundering practices and financing of terrorism thereby enhancing the nation's reputation in the international community.

Private Pensions Legislation

In November 2013, the Bill was tabled and passed in Parliament. The proposed amendments to the Pensions (Superannuation Funds and Retirement Schemes) Act seek to improve the issues associated with investment manager fees, conditional registration and harmonization of contribution limits with the provisions of the Income Tax Act.

Insurance (Amendment) Act

Draft Bills were prepared after consultation with the relevant stakeholders. The proposal to amend the Insurance Act aims to support the legislative framework of the Insurance Industry as well as harmonize certain provisions with other Financial sector legislation.

Bank of Jamaica (Amendment) Act

Additional drafting instructions were submitted to the Chief Parliamentary Counsel to have the Bill reviewed. The proposed amendments seek to give the Bank of Jamaica greater institutional responsibility to ensure stability of the financial system.

Omnibus Legislation

The Bill, which is currently being prepared by the Chief Parliamentary Counsel, seeks to amalgamate the provisions of the Banking Act, Financial Institutions Act and the Bank of Jamaica (Building Societies) Regulations into one legislation. It is expected to include amendments that will give the Bank of Jamaica more supervisory responsibilities for deposit-taking institutions.

Securities (Amendment) Act

In December 2013, the Bill was tabled and passed in Parliament. The amendment, which satisfied another structural benchmark under the Extended Fund Facility (EFF), seeks to improve the framework for the regulation of the Securities industry in order to achieve the following objectives:

- combat the establishment and proliferation of unregulated financial organizations
- strengthen the Financial Services Commission's investigative powers
- address other deficiencies in the regulatory framework of the securities industry.

TABLE 9.1
A SUMMARY OF BULLETINS, DISCUSSION PAPERS AND GUIDELINES

Industry	Title	Purpose
Insurance	Registration of Insurance Adjusters	To inform individuals to submist the requisite documents to the FSC by October 31, 2013
	Guidelines on Reinsurance Practices and Procedures	To provide guidleines for insurers' reinsurance programmes
	Repurchase Agreements (Repos) Backed By Government Of Jamaica (GOJ) Obligations Denominated In Foreign Currency	To clarify the asset factor that should apply in order to determine the Minimum Capital Test.
Securities	Proposed amendment to the Securities (Take-Overs and Mergers) Regulations	To obtain feedback from the industry on the proposal to amend the regulation 26 of the Securities (Take Overs and Mergers) Regulations (TOM).
Pensions	Lump Sum Payment on Death	To elucidate the provision in the Pensions Act that provides a ceiling for lump sum payments on death.
	Minimum Content of the Statement of Transfer Values	To highlight the relevant information that should be included in "Statements of Transfer Values" when a transfer of a member' s accrued pension benefit takes place.

Source: Financial Services Commission.

2 The Egmont Group of Financial Intelligence Units (FIUs) was established in 1995 as an informal group to encourage international co-operation. The objective of the group is to provide a forum for FIUs around the world in order to advance efforts to eradicate financing of terrorism and money-laundering practices.

Micro Credit Act

The Cabinet gave approval for drafting instructions to be issued. The new regulatory framework aims to resolve the deficiencies in the operations of the industry, promote transparency, protect consumers, and tackle money laundering.

Financial Services Commission (FSC)

Bulletins, Discussion Papers and Guidelines[3]

Bulletins, Discussion Papers and Guidelines were prepared to provide useful information and guidance to licensees, registrants and the general public (Table 9.1). Selected documents, which were circulated by the FSC, were grouped by industries—Insurance, Securities and Private Pensions.

Investigations & Enforcement

In 2013, the FSC received 181 complaints (excluding 30 unresolved that were brought forward from the previous year) compared with 168 complaints in 2012. The Insurance industry accounted for 141 complaints, followed by the Pensions industry (26) and the Securities industry (14). Within the Insurance industry, the largest number of complaints were:

— delays in claim settlement – 48

— claim not honoured by insurer – 36

— related to other uncategorized issues – 28

Additionally, the FSC conducted 75 investigations, of which, 25 were brought forward from the previous year.

PERFORMANCE

The Bank of Jamaica

Total assets at the BOJ was $355.1 billion, 12.9 per cent more than the previous year (Table 9.2). The larger asset base was due to increases in both Foreign Assets (up 4.5 per cent to $192.0 billion) and Local Assets (up 24.8 per cent to $163.0

TABLE 9.2
ASSETS AND LIABILITIES OF THE BANK OF JAMAICA AT DECEMBER 2012-2013
(J$ '000)

	2012	2013	% Change
Foreign Assets	183 764 366	192 041 420	4.5
Bonds & Other Long Term Securities	32 800 607	40 940 332	24.8
Time Deposits & Other Cash Resources	124 007 992	119 801 538	-3.4
IMF-Holding of Special Drawing Rights	26 955 767	31 299 550	16.1
Local Assets	**130 658 884**	**163 026 382**	**24.8**
Government Obligations:			
Holdings of GOJ Securities	92 303 137	100 316 388	8.7
Advances and Other GOJ Receivables	13 369 335	25 659 409	91.9
Advances to Financial Institutions	1 000 000	9 264 840	826.5
Items in The Process of Collection	345	0	-100.0
Other Assets	23 986 067	27 785 745	15.8
TOTAL ASSETS	**314 423 250**	**355 067 802**	**12.9**
Demand Liabilities	207 616 992	236 742 034	14.0
Notes & Coins in Circulation	67 384 880	71 838 839	6.6
Deposits			
Public Sector	63 30 174	24 903 271	293.4
IMF(GOJ)	73 325 376	73 233 238	-0.1
Commercial Banks and Other LFIs	57 475 582	65 030 542	13.1
Other	3 100 980	1 736 144	-44.0
Other Liabilities	**95 361 781**	**110 700 490**	**16.1**
International Monetary Fund			
Allocation of Special Drawing Rights	35 362 449	42 592 786	20.4
Foreign Liabilities	84 150	191 232	127.3
Open Market Instruments	49 537 150	59 115 274	19.3
Amounts Due to Government of Jamaica	4 502 753	0	-100.0
Other Liabilities	5 875 279	8 801 198	49.8
Total Capital & Reserves	**11 444 477**	**7 625 278**	**-33.4**
TOTAL LIABILITIES, CAPITAL & RESERVES	**314 423 250**	**355 067 802**	**12.9**

Source: Bank of Jamaica

3 Bulletins, discussion papers and guidelines are used by the Commission to provide information and guidance to licensees, registrants and the general public. They are circulated to relevant industry entities and posted on the Commission's website for comments and feedback.

TABLE 9.3
INSTITUTIONS IN THE JAMAICAN FINANCIAL SYSTEM, 2009-2013

Institutions	2009	2010	2011	2012	2013
Deposit-Taking Institutions:					
Commercial Banks	7	7	7	7	7
FIA Institutions	3	2	2	2	2
Building Societies	4	4	4	4	3
Credit Unions[a]	45	44	42	41	38
Non-Deposit -Taking Institutions:					
Insurance Companies	17	15	16	17	15
Developmental Banks	4	4	4	4	4
Securities Dealers	47	47	47	48	48

a - Credit Unions are not supervised by the BOJ

Source: Compiled by the Planning Institute of Jamaica

billion). Within the Foreign Assets category, Bonds & Other Long Term Securities and IMF-Holding of Special Drawing Rights increased by 24.8 per cent and 16.1 per cent, respectively. The expansion in Local Assets was attributed to increases in Holdings of GOJ Securities (up 8.7 per cent to $100.3 billion), Advances and Other GOJ Receivables (up 91.9 per cent to $25.7 billion), Advances to Financial Institutions (up 826.5 per cent to $9.3 billion) and Other Assets (up 15.8 per cent $27.8 billion). The increase in Total Liabilities, Capital & Reserves (up 12.9 per cent to 355.1 billion) denoted a rise in Demand Liabilities (up 14.0 per cent to $236.7 billion) and Other Liabilities (up 16.1 per cent to $110.7 billion) as total Capital & Reserves fell by 33.4 per cent to $7.6 billion.

Jamaica Deposit Insurance Corporation (JDIC)

Following the amalgamation of FirstCaribbean International Building Society with FirstCaribbean Internationl Bank (Jamaica) Limited, the number of

policyholders that received insurance coverage under the Deposit Insurance Scheme (DIS) was 12 compared with 13 in the previous year. Policyholders comprised seven commercial banks, two merchant banks and three buildings. The coverage limit remained unchanged at $600 000 per depositor, per insured institution. The take-up rate, for accounts that can be fully covered under the DIS, was approximately 97.0 per cent, which is consistent with the international trend of covering the majority of retail depositors (upwards of 90-95 per cent). The premium assessment rate remained at 0.15 per cent.

At the end of 2013, the Deposit Insurance Fund (DIF) declined by 5.8 per cent to $9.9 billion relative to the end of 2012. This out-turn was attributed to JDIC's participation in the NDX programme. Despite a decline in the DIF, there was an increase in premium income (up 8.3 per cent to $807.4 million). In contrast, there was, however, a decline in net investment income which fell by 2.1 per cent to $913.0 million. Of note, there were no failures in the banking system.

Deposit-Taking Institutions

The number of institutions regulated by the Central Bank declined by 1 to 12 (Table 9.3). Total Assets[4] at authorized

TABLE 9.4
SELECT KEY INDICATORS OF DEPOSIT-TAKING INSTITUTIONS PERFORMANCE, 2009-2013

	Dec 2009	Dec 2010	Dec 2011	Dec 2012	Dec 2013
Real GDP - Financial Sector ($million)	82 373.1	78 400.4	78 755.2	79 287.1	82 140
Percentage Contribution to Real GDP	11.2	10.8	10.8	10.9	11.2
Growth Rate (%)	1.6	-4.8	0.5	0.7	0.5
Average Employment (000)	25 650	24 300	25 233	25 875	26 000
Total Assets ($million)	775 848	782 640	820 558	882 774	977 150
Total Deposits ($million)	480 199	503 346	528 461	584 085	639 942
Total Loans ($million)	350 661	345 832	362 268	408 982	466 586
Capital Base ($million)	80 579	84 688	89 291	93 066	108 973
Non- Performing Loans[NPLs] (3 months &>) ($million)	16 438	22 365	32 202	28 723	25 015
NPLs:Total Loans (%)	4.7	6.5	8.9	7.0	5.4
Capital Base:Total Asses(%)	10.4	10.8	10.9	10.5	11.2
NPLs:Capital Base+Provisions (%)	17.7	22.3	28.4	24.1	18.8
Pre Tax Profit Margin (%)	21.4	21.1	30.8	21.4	19

r-revised

Source: Planning Institute of Jamaica and Bank of Jamaica

4 The Assets figures in Table 9.4 are net of provisions and therefore include guarantees, and exclude securities purchased with a view to resale.

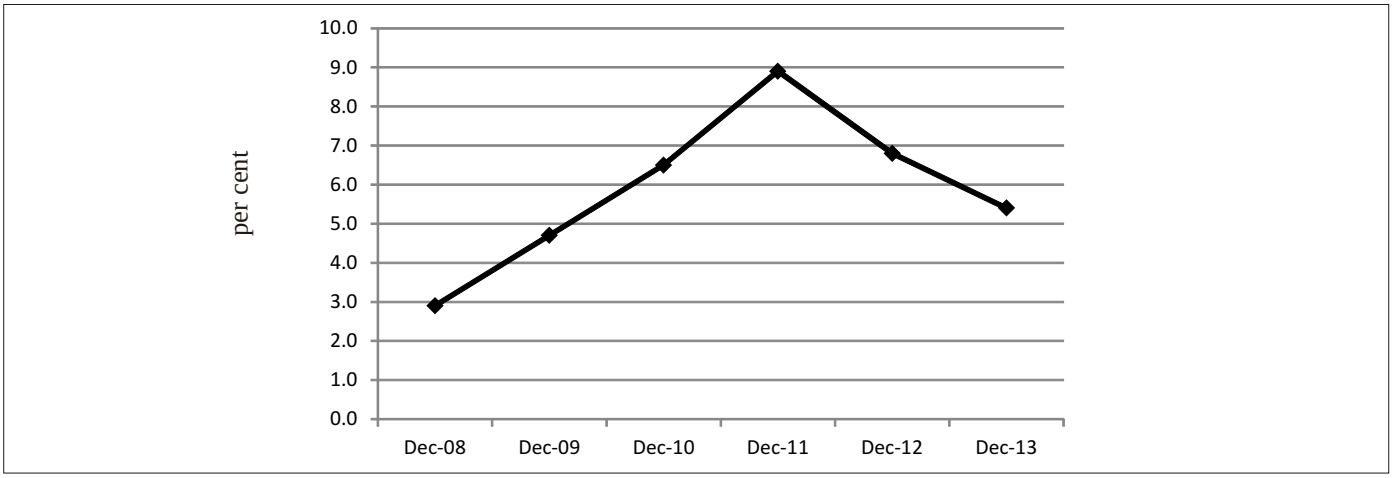

FIGURE 9B: NON-PERFORMING LOANS TO TOTAL LOANS RATIO (SYSTEM TOTAL), 2008-2013

deposit taking institutions was $977.2 billion, an increase of 10.7 per cent compared with 2012 (Table 9.4). The net interest income was bolstered by a rise in total deposits (up 9.6 to $639.9 billion) and loans (up 14.1 per cent to $466.6 billion).

Prudential indicators at the end of 2013 revealed that the value of non-performing loans (NPLs) declined by 12.9 per cent to $25.0 billion. The improved credit quality was attributed to a contraction in NPLS for Commercial Banks (down 11.0 per cent to $18.7 billion), FIA institutions (down 87.7 per cent to $0.1 billion) and Building Societies (down 8.1 per cent to $6.2 billion). NPLs, as a share of Total Loans, decreased by 1.6 percentage points to 5.4 per cent. This out-turn reflected a decline in ratios for Commercial Banks (down by 1.6 percentage points to 5.2 per cent), FIA Institutions (down by 15.6 percentage points to 1.7 per cent), and Building Societies (down by 0.7 percentage point to 6.4 per cent).

Commercial Banks

Total assets at commercial banks was $735.0 billion, representing a nominal increase of 7.9 per cent (Table 9.5). This translated into a real increase of 2.3 per cent relative to the end of 2012. The improved performance was attributed largely to:

— a rise in the stock of Loans & Advances Outstanding

— the reduction in the NPL ratio

— higher revenue generated from fees and commission income.

At the end of 2013, the stock of Loans & Advances amounted to $362.1 billion compared with $307.5 billion year-over-year (Table 9.6). This upturn was spurred partly by a real increase of 13.1 per cent for consumption purposes. The Goods Producing and Services industries recorded real growth of 1.2 per cent and 3.9 per cent, respectively. Loans & Advances outstanding accounted for 49.3 per cent of total

TABLE 9.5
ASSETS OF COMMERCIAL BANKS, DECEMBER 2009-DECEMBER 2013

	STOCK OF ASSETS ($ Million)						
	Dec 2009	Dec 2010	Dec 2011	Dec 2012	Dec 2013	% Change 2013/12	Real % Change 2013/12
Cash	7 241.4	8 234	9 792.9	9 949.5	11 160.4	1.6	2.5
Balances with BOJ	84 640.0	97 328.7	81 915.3	68 022.2	64 953.4	-17.0	-12.8
Foreign Assets	114 421.4	115 821.6	115 335.1	126 043.6	153 521.2	9.3	11.3
Loans & Advances Outstanding	256 389.9	251 340.6	266 044.2	307 477.9	362 116.9	15.6	7.6
Private Sector	222 491.6	221 202.4	243 206.9	282 168.8	334 081.3	16.0	8.2
Public Sector	33 898.2	30 138.3	22 837.3	25 309.1	28 035.7	10.8	1.2
Treasury Bills	578.8	486.3	847.8	198.8	311.1	-76.5	42.9
L.R.S.	24 377.1	0.0	0	0	0.0	n/a	n/a
Other Securities	38 728.7	68 913.7	81 681.9	88 619.4	83 050.7	8.5	-14.4
Cheques in the course of Collection	2 660.3	3 340.6	2 476.2	2 065.8	2 345.4	-16.6	3.7
Other Assets	43 110.5	40 462.3	50 298.9	54 075.5	57 537.3	7.5	-2.8
Total	572 148	585 927.8	608 392.2	656 452.6	734 996.3	7.9	2.3

Source: Bank of Jamaica

TABLE 9.6
COMMERCIAL BANKS LOANS AND ADVANCES 2009 - 2013
($'000)

	2009	2010	2011	2012	2013	% Change 2013/2012	Real % Change 2013/2012
GOODS PRODUCING	35 604 563	35 204 562	32 220 404	40 009 707	44 308 156	10.7	1.2
AGRICULTURE	5 869 963	4 519 525	5 366 124	6 138 237	7 733 771	26.0	15.1
(1) Production	5 735 289	4 352 404	4 847 285	5 138 694	6 306 724	22.7	12.1
(2) Marketing	134 276	165 005	490 659	782 907	1 248 785	59.5	45.7
(3) Land Acquisition	398	2 116	28 180	216 636	178 262	-17.7	-24.8
MINING	432 276	426 384	595 074	692 970	747 665	7.9	-1.4
MANUFACTURING	9 392 964	8 296 100	7 771 294	12 063 051	12 608 843	4.5	-4.5
(1) Sugar, Rum & Molasses	422 804	112 238	233 324	1 871 640	752 464	-59.8	-63.3
(2) Food, Drink & Tobacco	2 562 415	1 912 513	1 954 979	4 333 708	5 380 108	24.1	13.4
(3) Paper, Printing & Publishing	132 431	128 022	116 819	168 266	267 076	58.7	45.0
(4) Textile, Leather and Footwear	152 889	134 235	166 996	201 571	192 755	-4.4	-12.6
(5) Furniture, Fixtures & Wood Products	465 735	648 167	647 682	474 405	529 578	11.6	2.0
(6) Metal Products	355 426	379 154	237 634	228 327	214 530	-6.0	-14.2
(7) Cement & Clay Products	1 003 793	1 087 646	981 037	884 134	941 606	6.5	-2.7
(8) Chemicals & Chemical Products	943 525	648 803	374 787	819 764	647 356	-21.0	-27.9
(9) Other	3 353 946	3 245 322	3 058 036	3 081 236	3 683 370	19.5	9.2
CONSTRUCTION & LAND DEVELOPMENT	19 909 360	21 962 553	18 487 912	21 115 449	23 217 877	10.0	0.4
(1) Construction	18 433 556	21 139 999	17 734 419	19 299 390	21 822 377	13.1	3.3
(2) Land Development	1 239 189	545 299	596 680	1 683 826	1 145 622	-32.0	-37.9
(3) Land Acquisition	236 615	277 255	156 813	132 233	249 878	89.0	72.6
SERVICES	130 023 798	121 495 887	124 233 701	132 316 580	150 437 760	13.7	3.9
FINANCIAL INSTITUTIONS	1 027 752	944 145	1 677 375	2 287 006	3 090 795	35.1	23.5
TRANSPORT,STORAGE & COMMUNICATION	7 810 982	8 993 260	11 911 589	11 886 482	13 338 251	12.2	2.5
ELECTRICITY, GAS & WATER	4 882 390	4 590 927	5 733 524	7 517 952	12 015 418	59.8	46.0
GOVERNMENT SERVICES	33 898 240	30 138 267	22 837 320	25 309 088	28 035 652	10.8	1.2
(1) Central Government	12 639 417	11 044 879	9 793 679	9 520 873	7 067 298	-25.8	-32.2
(2) Local Government	6 982	1 477	39	44	6	-86.4	-87.5
(3) Selected Public Entities	19 995 953	15 086 881	12 189 529	15 219 351	20 495 732	34.7	23.0
(4) Other Public Entities	1 255 888	4 005 030	854 073	568 820	472 616	-16.9	-24.1
DISTRIBUTION	25 548 697	27 901 072	30 477 250	40 054 658	43 966 842	9.8	0.3
TOURISM	39 649 517	31 153 520	33 983 912	26 335 399	27 535 107	4.6	-4.5
ENTERTAINMENT	530 921	448 362	513 885	1 132 480	2 045 651	80.6	65.0
PROFESSIONAL & OTHER SERVICES	16 675 299	17 326 334	17 098 846	17 793 515	20 410 044	14.7	4.8
CONSUMPTION	90 761 501	94 640 184	109 590 099	135 151 644	167 371 006	23.8	13.1
PERSONAL	90 761 501	94 640 184	109 590 099	135 151 644	167 371 006	23.8	13.1
(1) Local Residents	83 716 560	87 881 669	102 153 988	127 342 775	156 312 678	22.7	12.1
(2) Overseas Residents	7 044 941	6 758 515	7 436 111	7 808 869	11 058 328	41.6	29.4
TOTAL	256 389 862	251 340 633	266 044 204	307 477 931	362 116 922	17.8	7.6

Source: Bank of Jamaica

TABLE 9.7
ASSETS OF INSTITUTIONS LICENSED UNDER THE FINANCIAL INSTITUTIONS ACT, DECEMBER 2009-2013

	STOCK OF ASSETS ($Million)						
	Dec-09	Dec-10	Dec-11	Dec-12	Dec-13	% Change	Real % Change
Cash & Deposits with Banks & Other Institutions	1 219.1	1 000.7	841.5	1 259.2	1 305.3	3.7	-5.3
Foreign Assets	14 569.8	11 731.6	9 876.2	11 716.4	14 083.8	20.2	9.8
Loans & Advances	10 041.7	7 250.1	6 885.4	5 625.1	7 093.1	26.1	15.2
Jamaican Government Securities	1 004.1	1 523.5	872.5	771.4	623.8	-19.1	-26.1
Other Assets	5 467.3	3 285.9	3 217.9	2 223.0	2 251.7	1.3	-7.5
Total	32 302.0	24 791.9	21 693.5	21 595.1	25 357.6	17.4	7.3

Source: Bank of Jamaica

assets, 2.5 percentage points more than at the end of 2012 (see Table 9.5). The profitability of banks was stimulated by the additional revenue received from the expanded loan portfolio. In particular, there was a rise in Net Interest Income associated with new loans issued in 2012.

Year-end data for 2013 revealed that the stock of Loans & Advances to the Goods Producing industry amounted to $44.3 billion relative to $40.0 billion in 2012 (see Table 9.6). The growth in credit was attributed to real increases in the stock of loans to Agriculture (up 15.1 per cent) and Construction & Land Development (up 0.4 per cent).

At the end of 2013, the stock of Loans & Advances to the Services industry totaled $150.4 billion. In real terms, this represented a 3.9 per cent increase compared with the end of 2012. The higher stock was attributed to a real increase in all of the categories, expect Tourism which declined by 4.5 per cent. For Consumption, the stock of Loans & Advances amounted to $167.4 billion compared with $135.2 billion at the end of 2012.

Financial Institutions Act (FIA) -Licensees

Total Assets for FIA licensees amounted to $25.4 billion, denoting a nominal increase of 17.4 per cent and a real increase of 7.3 per cent year-over-year (Table 9.7). The expansion in total assets was driven by real growth in the amount invested in Foreign Assets (up 9.8 per cent) and the stock of Loans & Advances (up 15.2 per cent). In contrast, Cash & Deposits with Banks & Other Institutions, the amount held in Jamaican Government Securities and the value of the Other Assets portfolio recorded real declines of 5.3 per cent, 26.1 per cent and 7.5 per cent, respectively.

At the end of 2013, the stock of Loans & Advances totalled $7.1 billion, up 15.2 per cent in real terms (Table 9.8). This positive out-turn was attributed to real increases in the stock allocated to the Services Industry (up 23.9 per cent) and for Consumption (up 19.8 per cent) which outweighed the decline in the amount disbursed to the Goods Producing industry (down 9.7 per cent). The growth in credit in the Services

TABLE 9.8
LOANS & ADVANCES OUTSTANDING TO LICENSEES UNDER THE FINANANCIAL INSTITUTIONS ACT, December 2011 - December 2013
($MILLION)

	Dec 2011	Dec 2012	Dec 2013	% Change	Real % Change
Goods Producing	**2 625.1**	**1 199.3**	**1 186.0**	**-1.1**	**-9.7**
Agriculture	19.7	27.0	61.6	128.1	108.4
Mining, Quarrying & Processing	0.0	128.4	164.3	28.0	16.9
Manufacturing	334.6	304.5	360.2	18.3	8.1
Construction & Land Development	2 270.8	739.4	599.9	-18.9	-25.9
Services	**2 597.8**	**2 264.4**	**3 072.4**	**35.7**	**23.9**
Transport Storage & Communication	7.6	0.4	193.5	48 274.5	44 088.3
Electricity, Gas & Water	1.0	0.0	2.5	-	-
Distribution	278.2	397.5	1 323.3	232.9	204.1
Tourism	312.7	120.0	201.4	67.8	53.3
Entertainment	2.0	0.0	57.6	-	-
Financial Institutions	143.6	47.5	137.7	190.0	164.9
Public Sector	0.4	0	0.0	-	-
Professional & Other Services	1 852.3	1 699.0	1 156.3	-31.9	-37.8
Consumption	**1 662.7**	**2 161.5**	**2 834.6**	**31.1**	**19.8**
Personal	1 662.7	2 161.5	2 834.6	31.1	19.8
TOTAL	**6 885.6**	**5 625.2**	**7 093.1**	**26.1**	**15.2**

Source: Bank of Jamaica

TABLE 9.9
ASSETS OF BUILDING SOCIETIES, 2009-2013

	Stock of Assets ($Mil- lion)						
	Dec-09	**Dec-10**	**Dec-11**	**Dec-12**	**Dec-13**	**%Change** 2013 /2012	**Real %Change** 2013 /2012
Cash & Deposits	14 932.0	5 236.6	3 103.4	7 478.4	11 788.6	57.6	44.0
Foreign Assets	19 469.4	24 795.4	32 987.6	35 862.1	45 389.8	26.6	15.6
Loans & Advances	84 580.2	87 260.6	89 339.6	95 879.1	97 376.5	1.6	-7.2
Govt. Securities	11 322.4	13 449.6	24 171.4	26 475.6	24 446.0	-7.7	-15.7
Other Assets	30 035.2	38 535.6	37 321.5	37 217.7	33 756.6	-9.3	-17.1
TOTAL	**160 339.2**	**169 277.8**	**186 923.5**	**202 913.0**	**212 757.5**	**4.9**	**-4.2**

Source: Bank of Jamaica

industry was due to an increase in allocation for all of the components, except Professional & Other Services which declined by 37.8 per cent in real terms. Within the Goods Producing Industry, the decrease in the stock was attributed to the real decline in the component Construction & Land Development (down 25.9 per cent).

Building Societies

At the end of 2013, total assets for Building Societies was $212.8 billion, representing a nominal increase of 4.9 per cent compared with the end of 2012 (Table 9.9). This, however, translated into a real decrease of 4.2 per cent due to reductions in the following categories: Loan & Advances (down 7.2 per cent); Government Securities (down 15.7 per cent); and Other Assets (down 17.1 per cent). In particular, investments in Government Securities were impacted by the reduction in interest rates, facilitated by the NDX.

In real terms, the stock of Loans & Advances decreased by 7.2 per cent to $97.4 billion. Subsequently, the share of Loans & Advances to Total assets declined by 1.5 percentage points to 45.8 per cent relative to 2012.

Credit Unions

The number of Credit Unions at the end of 2013 stood at 38 compared with 41 at the end of the previous year[5]. The asset base amounted to $76.6 billion, 7.7 per cent more than the total in 2012. In addition, increases were recorded for key performance indicators:

— Net Loans – up 9.5 per cent to $52.4 billion

— Savings – up 7.0 per cent to $58.9 billion

— Membership – up 0.3 per cent to 960 000 persons.

Interest Rates

The average commercial banks' overall weighted average monthly loan rates was 17.72 per cent, up 0.09 percentage point year-over-year (Table 9.10). This higher out-turn was

TABLE 9.10
COMMERCIAL BANKS' WEIGHTED AVERAGE MONTHLY LOAN RATES, 2012-2013
(PER CENT)

	Instalment credit		**Mortgage credit**		**Personal Credit**		**Commercial Credit**		**Local Govt & Other Public Entities**		**Central Govt.**		Overall	
End of Period	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**
January	19.14	17.91	10.45	9.87	21.8	24.9	14.43	12.68	10.63	10.76	9.76	9.7	18.04	18.23
February	19.05	17.88	10.36	9.83	21.67	24.84	13.89	12.42	11.33	10.85	9.75	9.75	17.77	18.09
March	18.92	17.75	10.79	9.82	21.57	24.61	14.04	12.56	9.95	10.44	9.8	8.92	17.7	17.97
April	18.82	17.62	10.14	9.79	21.53	24.58	14.02	12.5	10.09	10.35	9.51	8.6	17.77	17.92
May	18.66	17.46	10.42	9.77	21.21	24.07	13.79	12.49	10.17	9.95	9.46	8.78	17.45	17.77
June	18.56	17.35	10.26	9.75	21.17	23.95	13.69	12.4	10.03	10.49	9.48	9.57	17.36	17.66
July	18.4	16.91	10.14	9.75	22.27	24.84	13.47	12.72	10.5	10.37	9.42	9.6	17.64	17.58
August	18.3	16.9	10.12	9.96	22.14	25.02	13.44	12.77	10.32	10.47	9.42	9.58	17.54	17.53
September	18.25	16.86	10.04	9.93	21.83	25.02	13.29	12.66	10.22	10.57	9.57	10.14	17.4	17.45
October	18.13	16.83	9.99	9.91	21.95	24.67	13.04	12.78	16.85	11.29	9.16	9.86	17.28	17.48
November	17.99	16.82	9.93	9.89	21.79	24.52	13.05	12.85	10.27	11.51	9.18	9.87	17.15	17.44
December	17.96	16.81	9.9	9.88	25.21	24.77	12.87	12.76	10.69	10.99	9.72	9.96	18.44	17.49
Average	18.52	17.26	10.21	9.85	22.01	24.65	13.58	12.63	10.92	10.67	9.52	9.53	17.63	17.72

Source: Bank of Jamaica

5 C&WJ Co-operative Credit Union merged with Westmoreland Co-operative Credit Union while JPS & Partners Co-operative Credit Union merged with Ewarton Co-operative Credit Union and Kirkvine Co-operative Credit Union.

TABLE 9.11
COMMERCIAL BANKS MONTHLY WEIGHTED AVERAGE DEPOSIT RATES, 2012 - 2013
(PER CENT)

End of Period	Demand 2012	Demand 2013	Savings 2012	Savings 2013	Time 2012	Time 2013	Overall A/W Rates 2012	Overall A/W Rates 2013
January	1.47	1.39	1.99	1.45	4.1	3.58	2.45	1.98
February	1.44	1.42	1.91	1.1	3.75	3.58	2.25	1.82
March	1.36	1.33	1.82	1.08	3.7	3.55	2.19	1.8
April	1.02	1.31	1.83	1.08	3.71	3.32	2.19	1.67
May	1.55	1.66	1.83	0.98	3.68	3.44	2.24	1.74
June	1.3	1.68	1.83	0.96	3.59	3.21	2.14	1.61
July	1.29	1.61	1.61	0.96	3.61	3.35	2.02	1.71
August	1.29	1.57	1.5	1	3.39	3.65	2	1.81
September	1.29	1.5	1.48	0.98	3.82	3.88	2.02	1.97
October	1.32	1.56	1.55	0.99	3.94	4.19	2.14	1.97
November	1.23	1.58	1.51	1	3.81	4.34	2.05	2.03
December	1.38	1.56	1.49	0.98	3.92	4.26	2.1	2.04
Average	1.33	1.52	1.69	1.05	3.75	3.7	2.15	1.85

Source: Bank of Jamaica

attributed mainly to an increase in rates for Personal Credit (up 2.64 percentage points to 24.65 per cent) and Central Government (up 0.01 percentage point to 9.53 per cent).

For 2013, the average commercial banks' monthly weighted average deposit rates was 1.85 per cent, 0.3 percentage point less than the previous year (Table 9.11). The lower rate denoted a decrease in the Savings and Time deposit rates as the Demand rate increased year-over-year.

NON-DEPOSIT-TAKING INSTITUTIONS

Development Financing[6]

Total disbursements from Development Banks amounted to $6.1 billion. The amount was disaggregated as follows: Manufacturing ($2.0 billion); Mining & Quarrying ($0.1 billion); Agriculture ($1.8 billion); and Services ($2.2 billion).

TABLE 9.12
PERFORMANCE INDICATORS OF THE LIFE INSURANCE INDUSTRY, 2009-2013

Year	Number of Policies Sold	Net Premium Income $Million
2009	109 935	23 845.1
2010	117 141	25 697.7
2011	135 355	30 013.3
2012	155 600[r]	31 772.1[r]
2013	125 448[p]	87 793.0[p]

r- revised
p-preliminary

Source : Financial Services Commission

Life Insurance Companies

Relative to 2012, the total number of Life Insurance companies remained at six. The profitability of Life Insurance companies continued in 2013 as net earnings grew to $23.9 billion compared with $10.0 billion in 2012. Profits were driven by Net Premium Income which increased by $56.0 billion to $87.8 billion relative to the previous year. The industry performed positively despite a decline in the number of policies sold which fell by 30 152 to 125 448 (Table 9.12).

General Insurance Companies

At the end of 2013, the total number of general insurance companies was 9 compared with 11 in 2012. Collectively, the companies amassed a Net Profit of $4.9 billion, up $2.9 billion relative to 2012 (Table 9.13). This out-turn was due partly to an increase in Net Premium Income (up 164.4 per cent to $36.9 billion).

Funds Under Management (FUM)

At the end of December 2013, total FUM was $923.8 billion, representing a 5.0 per cent increase year-over-year. The rise in funds managed was attributed to an increase in the amount of money monitored by Securities Firms (up 4.3 per cent to $691.7 billion); Unit Trust Management Companies (up 33.9 per cent to $37.0 billion); Insurance Companies (up 5.9 per cent to 165.7 billion); and Others (up 20.5 per cent to $29.6 billion). Of note, money invested through Securities Firms accounted for 74.9 per cent of Total FUM.

The Jamaica Stock Exchange (JSE)

The Jamaica Stock Exchange (JSE) index fell by 12.5 per cent to close at 80 633.5 compared with the end of 2012. This out-turn reflected a decline of 16.7 per cent in total market capitalization to $492.2 billion. There were 31 companies listed

6 Data collected represent information provided by (National Export-Import Bank of Jamaica Ltd and Development Bank of Jamaica Ltd)

TABLE 9.13
PERFORMANCE INDICATORS FOR THE GENERAL INSURANCE INDUSTRY,2009-2013
$ MIILLION

Year	Assets	Liabilities	Net Premium Income	Profit/Loss (Net)
2009	44 668.5	28 337.5	12 331.0	2 083.2
2010	47 818.9	29 946.2	12 301.2	1 283.6
2011	49 919.2	31 771.3	12 971.2	3 798.6
2012	54 479.0[r]	35 826.7[r]	13 939.6[r]	2 312.2[r]
2013[u]	57 292.5	38 678.1	36 852.3	4 899.8

r - revised
u - unaudited

Source: Financial Services Commission

on the main exchange – 9 advanced; 21 declined; and 1remained unchanged. Declines in other key indicators included:

— number of transactions – down 6.3 per cent to 18 264

— volume of transactions – down 3.1 per cent to $1 386.4 million

— value of transactions – down 22.3 per cent to $14.2 billion.

Junior Stock Exchange Market[7]

The Junior Stock Exchange Market index advanced by 17.0 per cent to 757.9 compared with the end of 2012. The positive performance was spurred by an increase in the average price for stocks which impacted total market capitalization (up 23.9 per cent to $27.4 billion). Despite an increase of 55.4 per cent in the number of transactions to 7 157, the number of shares traded (477.7 million) and the value of transactions ($1.4 billion) decreased by 16.2 per cent and 73.3 per cent, respectively.

OUTLOOK

The Finance & Insurance Services industry is expected to grow in 2014. The downward movement in interest rates will facilitate increased borrowing by producers and consumers. The rise in demand for loans will also be spurred by renewed optimism (driven partly by the successful completion of three IMF tests) as well as an expansion in financial capital. Trading gains are anticipated to contribute to the profitability of banks. Additionally, deposit-taking institutions are expected to record an increase in net interest income and generate higher revenue from fees and commissions.

In 2014, Life and General Insurance companies are expected to be profitable as Net Premium and Net Investment incomes will continue to trend upwards. The amount of money that will be managed on behalf of investors is anticipated to positively impact the industry.■

7 The Junior Stock Exchange Market was established to raise capital for Small and Medium Enterprises with shareholders equity being between $50.0 million and $500.0 million.

CHAPTER 10

AGRICULTURE

INTRODUCTION

For calendar year 2013, real value added for the Agriculture, Forestry & Fishing industry declined by 0.5 per cent, reflecting contractions in three of the five sub-industries. (Figure 10A) {Table 10.1}. The overall reduction in output was due mainly to:

- the lingering effects of Hurricane Sandy, which occurred in October 2012 and negatively affected production, mainly in the first half of 2013
- drought conditions during January-April 2013 which reduced productive activities.

The industry accounted for 6.7 per cent of Gross Domestic Product. The impact of the adverse weather conditions resulted in declines in real value added of 11.3 per cent and 6.3 per cent in the first and second quarters of 2013, respectively. The industry, however, rebounded in the third and fourth quarters with increases of 5.9 per cent and 13.1 per cent, respectively. These increases were, however, not enough to offset the declines experienced in the first two quarters of the year.

During the year, the government continued to employ a number of strategies to foster growth in the industry. These included the continuation of programmes aimed at improving efficiency, offering farmers support in the areas of marketing, irrigation and extension services. This involves the expansion of the agro parks concept, which seeks to combine public and private partnership to develop productive and marketing infrastructure to improve productivity, quality and competitiveness. The government was also instrumental in implementing measures such as the Drought Mitigation Programme and the Hurricane Sandy Recovery Programme aimed at mitigating the effects of the adverse weather conditions. Farmers benefited from these programmes through the replacement of planting materials and other agricultural inputs as well as the trucking of water to the areas most affected by the drought conditions.

The Planning Institute of Jamaica's Agriculture Production Index indicated that gross output for the sub-industries Animal Farming, Traditional Export Crops and Post Harvest Activities declined by 1.1 per cent, 17.3 per cent and 6.4 per cent, respectively. The sub-industries Other Agricultural Crops and Fishing increased by 1.5 per cent and 35.0 per cent, respectively (Table 10.1).

Export earnings from traditional agricultural commodities[1] were valued at US$22.1 million compared with US$20.0 million in 2012. The increase in earnings was due to improved earnings from Citrus (Fresh Fruit) which increased by 76.5 per cent to US$3.3 million and Coffee which grew by 18.5 per cent to US$16.3 million (Table 10.2).

POLICIES AND PROGRAMMES

During 2013, the Ministry of Agriculture & Fisheries (MOAF), in keeping with the Vision 2030 Jamaica – National Development Plan, continued its policies and programmes geared towards the development of an efficient, competitive and diversified industry. This will facilitate the strengthening

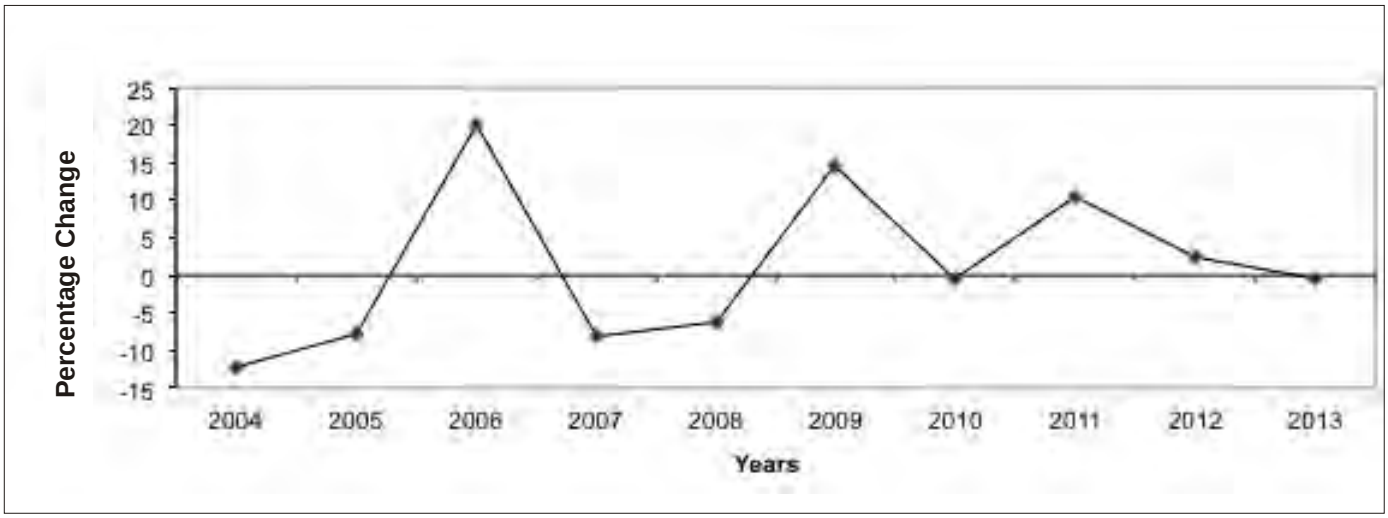

FIGURE 10A: REAL VALUE ADDED GROWTH FOR AGRICULTURE, FORESTRY & FISHING

1 These are coffee, bananas, citrus, cocoa and pimento.

TABLE 10.1
AGRICULTURE PRODUCTION INDEX(r)
2007=100

YEAR	SUB-INDUSTRIES					
	TRADITIONAL EXPORT CROPS	OTHER AGRICULTURAL CROPS	ANIMAL FARMING	FISHING	POST HARVEST ACTIVITIES	TOTAL
2007	100.0	100.0	100.0	100.0	100.0	**100.0**
2008	79.3	94.8	103.2	93.1	111.6	**93.7**
2009	89.6	112.7	100.5	92.6	101.3	**106.2**
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	83.4	141.2	101.8	96.4	63.9	**119.2**
% Change 2013/2012	-17.3	1.5	-1.1	35.0	-6.4	**-0.5**

r - revised

Source: Planning Institute of Jamaica

of the contribution of the industry to national food security and to the achievement of long-term development. Policy developments during 2013 included:

The Food and Nutrition Security Policy

The draft Food and Nutrition Security Policy developed during 2012 was approved by Cabinet in 2013. This policy defines the food and nutritional goals that are to be met, thereby affording the country's agriculture and food systems the opportunity to deliver adequate and nutritionally appropriate quantities of food, especially to low income and vulnerable groups. In addition, it will facilitate a structured food import replacement programme and a re-orientation of food imports and the food distribution system, to increase the availability of nutritious foods. Subsequent to the approval of the policy by Cabinet, the Food and Nutrition Security Action Plan was drafted and consultations held with the relevant stakeholders.

The Animal Health and Welfare Policy

The Policy was drafted and stakeholder consultations held in 2013. The objective of this policy is to harmonize and strengthen the regulatory, legislative and institutional framework governing the animal health and welfare system. This is in keeping with the standards established by the World Organization for Animal Health and the CODEX Alimentarius Commission – the global reference point for consumers.

National Plant Health Policy – Implementation Plan

The Plan was drafted in 2013 and provides the road map for achieving the objectives of the Policy, thus improving Jamaica's Plant Health. In addition, the Implementation Plan will provide for the revision of existing legislation, building of institutional capacity, scientific systems, quarantine capacity, surveillance systems, emergency response for pest outbreaks and increased public awareness.

Food Safety Policy and Implementation Plan

During 2013, the Food Safety Policy and Implementation Plan were tabled in the Houses of Parliament as a Ministry Paper. The tabling of the Policy will allow for full implementation as the MOAF continues to support food safety systems and traceability of food from 'farm to table' in Jamaica.

TABLE 10.2
VALUE OF AGRICULTURAL EXPORTS, 2009 - 2013
(US$' 000)

	2009	2010	2011	2012	2013p	% Change 2013/2012
Traditional Export Crops						
Bananas	6	1	63	120	62	-48.3
Citrus (Fresh Fruit)	1 710	1 831	2 180	1 883	3 322	76.5
Coffee	33 815	19 191	18 326	13 778	16 327	18.5
Cocoa	1 778	1 021	1 108	1 936	504	-74.0
Pimento	1 753	2 866	1 835	2 303	1 912	-17.0
TOTAL	**39 062**	**24 910**	**23 512**	**20 020**	**22 127**	**10.5**

p - preliminary

Source: Statistical Institute of Jamaica

TABLE 10.3
PRODUCTION STATISTICS: SUGAR CANE AND DERIVATIVES, 2009 - 2013

PARTICULARS	UNIT OF MEASURE	2009	2010	2011	2012	2013
Cane Milled (Crop Year)						
Total	**'000 tonnes**	**1 334.6**	**1 390.1**	**1 518.3**	**1 475.2**	**1 402.6**
Farmers		576.9	572.1	613.0	561.6	573.4
Estates		757.7	817.9	905.3	913.6	829.2
Sugar Production (Commercial)						
Calendar Year	'000 tonnes	126	116.5	137.8	130.7	120.4
Crop Year	'000 tonnes	121.5	117.2	134.3	126.4	122.8
Acreages Reaped Industry	'000 hectares	26.2	27.6	27.9	28.1	29.2
Farmers		10.8	10.9	10.6	10.9	12.6
Estates		15.4	16.7	17.3	17.1	16.6
Tonnes Cane Per Hectare						
Industry		51	50.3	54.4	52.6	48.0
Farmers		53.52	52.6	57.8	51.3	45.6
Estates		49.2	48.9	52.4	53.4	49.9
Tonnes Cane Per Commercial Sugar		10.98	11.86	11.31	11.21	11.42
Tonnes Cane Per 96 Sugar		10.61	11.41	10.88	11.21	10.94
Tonnes Sugar Per Hectare		4.8	4.41	5.01	4.69	4.39
Molasses						
Production	'000 tonnes	57 679	57 814	59 951	57 166	54 878
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

Projects/Programmes

The MOAF pursued various projects and programmes to achieve its developmental goals. The main projects/programmes pursued were as follows:

Agro Park Development Project

The implementation of the Agro Park[2] Project which began in 2012, continued during 2013. The primary objective of this project is to facilitate the expansion of the productive capacity of the agricultural sector. This is to be achieved through the building of infrastructure to support investments in the production of selected crops directed towards import substitution and replacement as well as the provision of raw materials for agro-processing and non-traditional exports. A total of nine Agro Park sites are to be developed.

By the end of 2013, seven of the nine Agro-Parks selected commenced agricultural production of a wide range of domestic crops[3]. These were Plantain Garden River, St.

TABLE 10.4
SUGAR EXPORTS BY DESTINATION, 2009 - 2013

DESTINATION	2009		2010		2011		2012		2013	
	Quantity (tonnes)	Value (fob) US$m	Quantity (tonnes)	Value (fob) US$m	Quantity (tonnes)	Value (fob) US$m	Quantity (tonnes)	Value (fob) US$m	Quantity (tonnes)	Value (fob) US$m
EUROPEAN UNION	120 180	75.6	78 639	36.5	94 440	51.1	103 118	95.3	82 405	71 086
USA	0	0.0	13 980	9.1	16 283	13.2	0	0	0	0
OTHER	30	28	280	0.2	27	0.03	36	0.04	64	78
TOTAL	120 210	75.7	92 899	45.8	110 750	64.3	103 154	95.3	82 469	71 164

Source: Sugar Industry Authority

2 An Agro Park is an area of intensive agricultural production which seeks to integrate all facets of the agricultural value chain from pre-production to production, post harvesting and marketing.

3 Crops planted include vegetables, condiments, fruits and tubers.

Thomas; Yallahs, St. Thomas; Amity Hall, St. Catherine; Hill Run, St. Catherine; Ebony Park, Clarendon; New Forest/Duff House, St. Elizabeth/Manchester. The other two agro parks are scheduled to come on stream by FY 2014/15.

Rationalization Of The Agricultural Commodity Boards And Export Division

The MOAF began the process of rationalization of the Agricultural Commodity Boards for Coffee, Cocoa, Coconut and the Export Division into a single regulatory body. During 2013, the MOAF was successful in the development of a profile and organizational structure for the new entity. The process is aimed at placing the marketing of commodities in the hands of the private sector while strengthening the capacity of Government to play a regulatory role in the development of these commodities to enhance national development.

Strengthening of the Ministry's Food Safety Infrastructure

The MOAF commenced the process for the development and implementation of a strategic planning framework for the Abattoir Meat Science System in Jamaica, in accordance with international and local food health & safety requirements and standards. This is expected to facilitate trade in the international meat market by the implementation of meat science programmes geared towards international standards and quality. These infrastructural developments will also support capacity building through teaching and certification in quality standards for meat production through public-private partnerships. Based on this framework, three main initiatives were identified. These were: (a) implementation of a Local Abattoir Meat Science System; (b) National Animal Identification Traceability System for Cattle; and (c) the establishment of a Multispecies Abattoir through a public-private partnership.

Achievements during 2013 included the development of an action plan for a functioning Animal Identification and Traceability System database application and the initial start of the tagging process of cattle.

PERFORMANCE OF THE AGRICULTURE, FORESTRY & FISHING INDUSTRY

The Agriculture, Forestry & Fishing industry declined by 0.5 per cent during 2013. This was due mainly to adverse weather conditions which negatively impacted production in the first half of the year. Improved performance in the second half of the year was insufficient to offset the negative performance during the first half of the year. Declines were recorded for the sub-industries Export Crops, Animal Farming and Post Harvest Activities, while improved performances were recorded for Other Agricultural Crops and Fishing (see Table 10.1).

TRADITIONAL EXPORT CROPS

Gross output for Traditional Export Crops declined by 17.3 per cent (see Table 10.1). The decline was due mainly to lower output for Banana (down 21.6 per cent) and Sugar Cane (down 4.9 per cent). Combined, these two crops accounted for over 80.0 per cent of the value of that sub-industry. Earnings from Traditional Export Crops were US$22.1 million compared with US$20.1 million in 2012. The increase in the value of exports was due mainly to increased earnings from Coffee and Citrus exports (see Table 10.2).

Sugar Cane

For the 2012/2013 crop year (November 2012-October 2013), 1 402 564 tonnes of sugar cane were milled producing 122 835 tonnes of sugar (Table 10.3). This compared with the previous crop year when 1 475 225 tonnes of sugar cane were milled, yielding 126 377 tonnes of sugar. Sugar cane milled is supplied to the factories from two sources, namely, Private Farms and the Estates operated by the factories (see Table 10.3). The decline in sugar cane production was due to a fall-off in the quantity of sugar cane produced by the Estates. For the 2012/13 crop year, sugar cane supplied by the Estates declined from 913 632 tonnes in the previous crop year to 829 210 tonnes. Sugar cane supplied by Private Farms increased to 573 354 tonnes from 561 593 tonnes in the previous crop year. The decline

TABLE 10.5
PRODUCTION OF SELECTED TRADITIONAL EXPORT CROPS, 2009 - 2013

PARTICULARS	CROP-YEAR	UNIT	2009	2010	2011	2012	2013	% Change 2013/2012
1. Bananas	January - December	Tonnes	45 334	53 649	46 660	47 473	37211	-21.6
2. Citrus								
Estimated Total Production	July - June	Tonnes	128 241	117 440	106 922	97 072	83 758	-13.7
Sweet Orange			118 440	108 376	100 093	91 657	79 178	-13.6
Grapefruit			1 200	1 421	800	571	614	7.5
Ortanique			6 613	5 819	4 661	3 960	3 426	-13.5
Ugli			1 988	1 824	1 368	884	540	-38.9
3. Coffee (Cherry)	August - July							
Estimated Total Production		Tonnes	12 456	9 121	8 099	6 687	6 984	4.5
Blue Mountain			10 042	7 535	6 574	5 576	5 839	4.7
Non- Blue Mountain			2 414	1 586	1 543	1 111	1 146	3.2
4. Cocoa	October - September							
a) Deliveries to Processing Plants		Tonnes	1 108	1 368	499	1 393	997	-28.4
b) Out-turn from Processing Plants		Tonnes	463	545	200	557	399	-28.4
5. Coconut	January - December	Millions	95.0	95.3	95.6	96.4	97.4	1.0

Source: Commodity Boards

TABLE 10.6
FARMGATE PRICES OF SELECTED TRADITIONAL EXPORT CROPS, 2009 - 2013

PARTICULARS	UNIT	2009	2010	2011	2012	2013[P]	% Change 2013/2012
1. Sugar	J$/Tonne	46 424	40 641	47 925	75 594	75 594	0.0
2. Bananas							
Price to Growers	J$/Tonne	44 000	44 000	44 000	55 115	55 115	0.0
3. Citrus							
Oranges	J$/Tonne(Solids)	127 680	121 000	168 000	212 800	209 000	-1.8
Ortaniques	J$/Tonne(Solids)	127 680	121 000	168 000	212 800	209 000	-1.8
Grapefruits	J$/box	185	185	185	220	380	72.7
4. Coffee							
Price to Growers							
- Blue Mountain	J$/Tonne	124 986	117 211	113 677	121 253	128 602	6.1
- Non-Blue Mountain	J$/Tonne	73 560	67 975	69 673	73 487	91 858	25.0
5. Cocoa	J$/Tonne	146 006	146 006	162 000	200 000	200 000	0.0
6. Pimento	J$/Tonne	174 838	187 390	253 000	253 000	264 000	4.3
7. Coconut							
Seeds	J$/Seed	35	35	50	50	50	0.0

p - preliminary

Source: Based on data supplied by Commodity Boards and the Ministry of Agriculture & Fisheries

in production from the Estates was due to the insufficient replanting of sugar cane.

There was an improvement in the quality of sugar cane produced. This was reflected in the tc:ts ratio (the amount of sugar cane used to produce one tonne of sugar) which moved to 10.94 tonnes from 11.21 tonnes in the previous crop year. This was also attributed to improved factory efficiency.

For the 2012/13 crop year, the ex-factory price for sugar was $75 594 per tonne, the same as the previous crop year (Table 10.6). The proportionate allocation of the ex-factory price between sugar cane growers and manufacturers was maintained at a ratio of 62:38.

The volume of sugar exported for calendar year 2013 was 82 469 tonnes valued at US$71.2 million compared with 103 154 tonnes in 2012 valued at US$95.3 million (Table 10.4). The increased earnings from exports reflected an upward movement in the price of sugar obtained on the export market. The majority of the sugar was exported to the European Union, with the exception of 64 tonnes, which was shipped to Other destinations.

Bananas[4]

Banana production during 2013 was estimated at 37 211 tonnes compared with 47 473 tonnes in 2012 (Table 10.5). The decline in output was due to the lagged effect of Hurricane Sandy which occurred on October 24, 2012. The hurricane destroyed approximately 66.0 per cent of the banana crop which requires a gestation period of nine to twelve months. As a result, increased yields occurred only in the fourth quarter of 2013, as the first three quarters recorded declines in output and consequently reduced exports. In 2013, a total of 76.6 tonnes of the fruit valued at US$62 000 was exported compared with 150.9 tonnes valued at US$120 000 in 2012.

Coffee

The volume of coffee berries delivered to processing plants during the 2012/13 crop year (August 2012 – July 2013) increased by 4.5 per cent to 6 985 tonnes compared with the previous crop year (see Table 10.5). This should, however, be viewed against the background of lower than normal production levels in the previous crop year [5], when output was hampered by:

- continued low demand from the Japanese market
- weak demand associated with unstable market conditions and late payments by marketing companies
- the Coffee Leaf Rust Disease which reduced yields of bearing trees.

These factors continued to impact the 2012/13 crop year.

Deliveries of Blue Mountain cherry coffee increased by 4.7 per cent to 5 838 tonnes, while Non-Blue Mountain cherry coffee went up by 3.2 per cent to 1 146 tonnes (see Table 10.5).

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.

5 National production was the lowest since the 1988/89 crop year when the industry was severely affected by Hurricane Gilbert.

TABLE 10.7
DOMESTIC CROP PRODUCTION, 2009 - 2013

PARTICULARS	UNIT OF MEASUREMENT	2009	2010	2011	2012	2013	% Change 2013/2012
DOMESTIC FOOD CROPS	Tonnes	489 672	500 304	592 108	610 138	614 912	0.8
Legumes	Tonnes	4 820	3 930	5 091	5 261	5 501	4.6
Gungo Peas		847	749	965	951	957	0.6
Red Peas		768	682	906	987	1 069	8.3
Peanut		2 704	2 007	2 643	2 701	2 832	4.9
Other Legumes		474	492	577	622	643	3.4
Vegetables	Tonnes	173 589	165 457	223 545	224 131	233 226	4.1
Cabbage		25 896	24 515	33 046	32 687	34 584	5.8
Callaloo		12 939	12 886	15 693	16 607	15 840	-4.6
Carrot		25 437	21 026	32 004	29 528	31 829	7.8
Cho Cho		3 162	3 876	4 691	5 394	4 907	-9.0
Cucumber		11 428	11 681	16 025	16 617	17 425	4.9
Lettuce		7 325	7 203	11 185	10 372	11 368	9.6
Okra		4 377	4 202	5 513	6 344	6 701	5.6
Pumpkin		39 785	39 292	49 432	52 170	52 072	-0.2
Tomato		21 190	19 006	26 950	26 526	29 128	9.8
Other Vegetables		22 050	21 770	26 006	27 886	28 572	2.5
Condiments	Tonnes	34 313	34 706	44 712	46 854	52 295	11.6
Escallion		10 181	11 194	13 908	14 142	16 296	15.2
Onion		721	555	1 015	1 088	680	-37.5
Hot Pepper		10 565	11 206	13 293	14 263	15 204	6.6
Sweet Pepper		10 804	10 017	14 998	15 155	17 396	14.8
Other Condiments		2 040	1 735	1 498	2 206	2 719	23.3
Fruits	Tonnes	46 768	38 002	38 742	45 023	46 325	2.9
Cantelope		2 337	2 333	2 624	3 243	3 469	7.0
Paw-Paw		10 671	5 314	5 846	6 455	8 382	29.9
Pineapple		21 368	19 749	17 607	19 757	19 185	-2.9
Watermelon		12 393	10 606	12 666	15 569	15 288	-1.8
Cereals	Tonnes	2 359	2 627	2 968	3 121	2 996	-4.0
Corn		2 359	2 363	2 733	2 822	2 965	5.1
Rice		0	264	235	299	31	-89.6
Plantain	Tonnes	24 621	29 826	35 335	36 203	30 937	-14.5
Horse Plantain		18 792	23 519	27 509	27 381	23 568	-13.9
Other Plantain		5 829	6 307	7 826	8 822	7 369	-16.5
Yams	Tonnes	124 516	136 785	134 620	145 059	138 834	-4.3
Lucea		9 609	10 744	9 138	9 412	10 208	8.5
Negro		15 289	15 163	16 311	15 632	15 301	-2.1
Renta		8 253	9 444	9 892	10 017	9 038	-9.8
St.Vincent		2 443	2 902	2 801	2 420	2 104	-13.1
Sweet		4 411	3 907	3 291	2 609	1 805	-30.8
Tau		2 245	2 442	2 507	2 675	3 207	19.9
Yellow		80 531	89 944	88 601	100 325	95 334	-5.0
Other Yam		1 735	2 240	2 079	1 971	1 836	-6.8
Other Tubers	Tonnes	34 936	42 181	48 459	45 713	41 670	-8.8
Bitter Cassava		5 764	6 426	7 522	6 036	5 750	-4.7
Sweet Cassava		8 231	12 064	13 011	11 984	11 621	-3.0
Coco		6 635	7 494	9 432	9 805	9 160	-6.6
Dasheen		14 305	16 196	18 493	17 888	15 140	-15.4
Potatoes	Tonnes	42 937	45 734	57 424	57 561	61 645	7.1
Irish		8 708	11 222	15 333	15 395	17 421	13.2
Sweet		34 229	34 512	42 091	42 165	44 224	4.9
Sorrel	Tonnes	812	1 057	1 212	1 212	1 483	22.4

Discrepancies in table due to rounding

Source: Ministry of Agriculture & Fisheries

TABLE 10.8
DOMESTIC FARMGATE PRICE INDEX, 2009 - 2013
2007 = 100

	2009	2010	2011	2012	2013	%Change 2013/2012
LEGUMES	136.2	154.3	184.2	175.0	191.3	9.3
ROOTS & TUBERS	155.3	143.0	163.3	146.4	180.0	22.9
OTHER TUBERS	149.8	155.1	142.3	138.5	192.2	38.8
CEREALS	121.6	138.1	203.7	173.0	169.2	-2.2
CONDIMENTS	81.0	127.6	97.4	99.8	93.9	-5.9
FRUITS	129.0	132.2	129.6	127.5	148.4	16.4
VEGETABLES	118.6	151.3	119.1	128.6	133.0	3.5
OVERALL INDEX	141.1	144.7	146.7	139.2	165.3	18.7

Source: Planning Institute of Jamaica

The weighted average Farmgate price paid for Blue Mountain cherry coffee and Non-Blue Mountain cherry coffee was $128 602 per tonne and $91 858 per tonne, respectively (Table 10.6). The value of coffee exported during 2013 was US$16.3 million compared with US$13.8 million in 2012.

Citrus

For the 2012/13 crop year (July 2012-June 2013), citrus production was estimated at 83 758 tonnes, a decline of 13.7 per cent (see Table 10.5). The decline in this sub-industry was due mainly to the 'Citrus Greening Disease' in Jamaica. This disease causes trees to produce predominantly green fruits which fail to ripen. The Citrus Greening Disease in the industry led to a decline of all citrus crops (with the exception of Grapefruit) ranging from 13.6 per cent for sweet orange to 38.9 per cent for Ugli.

Coconut

Production in 2013 was estimated at 97.4 million coconuts compared with 96.4 million coconuts in 2012 (see Table 10.5). The performance of this sub-industry continued to be negatively affected by the Lethal Yellowing Disease. However, the Coconut Industry Board (CIB) has made much progress in curtailing the disease and made positive steps towards developing a variety of coconut which will be resistant to the disease. Approximately 4 623 trees were lost to the disease in 2013 compared with 10 062 trees in 2012. Success in this area was facilitated by the project—Sustainable Coconut Production through Control of Coconut Lethal Yellowing—which began in 2007 and ended in 2012. The CIB continued to build on the success of the project by removing and burning all lethal yellowing infected coconut trees as a means of controlling the spread of the disease and replaced, where possible, with healthy coconut seedlings. In 2013, the Board distributed 112 521 coconut seedlings to farmers, an increase of 32 059 relative to 2012.

Cocoa

The volume of wet cocoa beans delivered to fermentaries for the 2012/13 crop year (October 2012 – September 2013) amounted to 997.0 tonnes compared with 1 393 tonnes in the

TABLE 10.9
LIVESTOCK PRODUCTION, 2009 - 2013

PARTICULARS	UNIT OF MEASUREMENT	2009	2010	2011	2012	2013[p]	% Change 2013/2012
LIVESTOCK SLAUGHTER	Heads						
Cattle	"	21 009	20 404	21 218	21 495	20 790	-3.3
Hogs	"	121 954	108 568	108 961	142 716	108 936	-23.7
Goats	"	43 160	49 085	56 498	54 694	52 682	-3.7
Sheep	"	805	400	852	1 296	1 144	-11.7
MEAT, FISH AND DAIRY							
Beef & Veal	000 kgs.	5 426	5 264	5 621	5 800	6 221	7.3
Pork	" "	8 958	7 973	7 110	9 490	8 998	-5.2
Goats Flesh	" "	867	937	1 316	1 094	929	-15.1
Mutton	" "	17	11	23	32	24	-25.0
Poultry	" "	104 502	100 637	101 526	102 167	101 933	-0.2
Aquaculture (Tilapia, Shrimp)	Tonnes	5 141	4 184	1 150	644	836	29.8
Marine (Fish, Conch, Lobster, Shrimp)	" "	13 205	12 314	14 208	10 494	n/a	n/a
Eggs	Million	128.5	109.0	137.5	170.2	125.0	-26.6
Milk	Million Litres	14.0	12.5	12.4	12.9	12.3	-4.0

n/a - not available
p - preliminary
Discrepancies in table due to rounding

Source: Ministry of Agriculture & Fisheries; Ministry of Health

previous crop year (see Table 10.5). The decline in output was due to the combined effect of Hurricane Sandy in October 2012 and drought conditions in the first four months of 2013 which severely affected production. In response to the adverse weather conditions, the Cocoa Board embarked on recovery programmes to boost production. The Farmgate price paid to farmers remained at $200 000 per tonne (see Table 10.6). Consistent with its reduced level of production, the value of exports for the calendar year 2013 was US$0.5 million compared with US$1.9 million in 2012 (see Table 10.2).

OTHER AGRICULTURAL CROPS

Gross output for Other Agricultural Crops, which comprise mainly Domestic Crops, grew by 1.5 per cent (see Table 10.1). However, the performance in the first half of the year was severely affected by the combined effects of drought conditions and the lingering impact of Hurricane Sandy, resulting in declines of 9.9 per cent and 3.3 per cent in the first and second quarters, respectively. This subcategory, however, rebounded in the second half of the year with increases of 8.7 per cent and 10.6 per cent in the third and fourth quarters, respectively, which offset the earlier declines. The increase in output during the latter half of the year was facilitated by favourable weather conditions. Additionally, there were government initiatives such as: (a) the Hurricane Sandy Recovery Programme from which farmers benefited through the receipt of replacement planting materials; (b) the Drought Mitigation Programme from which farmers benefited from the trucking of water to some of the most affected areas; and (c) the Agro Park Programme.

Five of the nine crop groups recorded increased output, ranging from 2.9 per cent for Fruits to 11.6 per cent for Condiments. The largest declines were recorded for Plantains (down 14.5 per cent) and Other Tubers (down 8.8 per cent) {Table 10.7}.

The Domestic Farmgate Price Index showed an overall increase of 18.7 per cent. Five of the seven crop groups recorded increased prices of between 3.5 per cent for vegetables to 38.8 per cent for Other Tubers. Reduced prices were recorded for Condiments (down 5.9 per cent) and Cereals (down 2.2 per cent) {Table 10.8}.

The area of Domestic Crops reaped increased by 2.6 per cent to 45 784.8 hectares. St. Elizabeth accounted for the largest share of Domestic Crops reaped with 11 460.4 hectares, followed by Manchester with 7 697.9 hectares and Trelawny with 6 583.8 hectares. These three parishes accounted for 56.2 per cent of the total area of Domestic Crops reaped during 2013, up from 55.6 per cent in 2012.

ANIMAL FARMING

The gross output for the Animal Farming sub-industry declined by 1.1 per cent during 2013 (see Table 10.1). Declines were recorded for Pork (down 5.2 per cent); Mutton (down 15.1 per cent); and Poultry (down 0.2 per cent). There was, however, an increase in Beef & Veal production (up 7.3 per cent) {Table 10.9}. The decline in the production of Pork may be due to the withdrawal of some farmers from this activity consequent on an over supply of this commodity during the previous year.

FISHING

Fish production for calendar year 2013 is estimated to have improved by 35.0 per cent. The increase in production was due to increases for both Aquaculture and Marine fish production. Aquaculture production increased by 29.8 per cent to 835.9 tonnes (Table 10.9). This was attributed mainly to improved management practices as well as a greater availability of Red Tilapia seedstock for the stocking of ponds.

Marine production is estimated to have increased. At the end of 2013, there were 23 323 fishers and 6 300 registered boats operating from 187 fishing beaches and two cays located at the Pedro Bank. This compared with 21 500 fishers and 6 007 registered boats operating from 187 fishing beaches at the end of 2012.

FINANCING TO THE INDUSTRY

During 2013, the Development Bank of Jamaica (DBJ) continued to provide loans for potentially viable agriculture and agro-processing projects. Loans were made via the People's Cooperative (PC) Bank and the other Approved Financial Institutions (AFIs). The uptake of loan funds amounted to $2 184.7 million compared with $676.2 million in 2012 (Table 10.10). There were no foreign currency loan issued in 2013. In 2012, foreign currency loans disbursed amounted to US$5.8 million.

The total uptake of loans for agricultural projects increased to $2 109.7 million from $359.5 million in 2012, while the uptake of loans for Agro-Processing activities declined from $316.7 million in 2012 to $75.0 million (Table 10.10). All of the sub-industries for agricultural projects recorded increases in the uptake of loans. The most significant increase was recorded for Livestock which moved to $1 271.1 million from $223.4 million in 2012. This was largely due to the increased investment in the Poultry sub-industry which moved to $1 074.0 million from $177.4 million in 2012. There was also a significant increase in the uptake of loans to the Farm Infrastructure and Export Crops sub-industries. The former moved to $339.0 million from $19.2 million in 2012 due to a $323.0 million loan for energy-related activities. For the Export Crops sub-industry, there was an increase to $384.2 million from $15.7 million due to a $344.3 million loan for sugar cane production.

The wholesale lending rate to Approved Financial Institutions and the rate at which farmers accessed these loans varied based on the line of credit (Table 10.11). The lowest interest rate of 4.0 per cent offered by the Development Bank of Jamaica, in collaboration with the MOAF, was made available through the Dairy Revitalization line of credit to dairy farmers. Loans funded by the Caribbean Development Bank (CDB) were geared towards agriculture and agri-business. The PetroCaribe Energy line of credit targeted projects from the Small and Medium Enterprises (SME) group. Foreign currency loans were made available at a rate of 8.25 per cent.

The total stock of agricultural loans outstanding at the DBJ at the end of 2013 was $2 853.9 million relative to $2 422.9 million in 2012 (Table 10.12). Loans issued amounted to $14 149.4 million and the amount repaid was $11 295.5 million. The stock of loans outstanding at commercial banks was $1 347.2 million.

OUTLOOK

Real value added for the Agriculture, Forestry & Fishing industry is expected to grow in 2014 following its strong performance in the second half of 2013. This is predicated on:

- continued favourable weather conditions
- increased farming activities in areas designated for agro parks as the government continues to develop a market-led and sustainable industry to enhance the level of production

TABLE 10.10
DEVELOPMENT BANK OF JAMAICA: LOAN ALLOCATION TO THE AGRICULTURAL INDUSTRY:2009 - 2013
(J$ '000)

SUB-INDUSTRIES	2009	2010	2011	2012	2013
Domestic Crops					
Cassava	432	0	0	0	0
Sweet Potatoes	2 960	822	7 539	0	0
Irish Potatoes	25 018	19 691	129 560	2 500	23 700
Peanuts	200	0	0	0	0
Pineapple	300	0	0	0	0
Pumpkin	0	0	200	0	0
Bananas/Plantain	7 200	630	3 310	14 777	0
Pepper	12 508	0	4 050	2 270	1 200
Yams	1 923	17 823	1 450	1 000	0
Greenhouse Vegetables	48 970	178 856	37 330	17 000	2 550
Ginger	0	0	0.0	1 150	850.0
Vegetables	1 839	19 567	17 000	850	1 500
Melon	267	660	0	0	0
Horticulture	7 800	0	1 535	0	0
Onion	0	0	130 500	0	5 440
Escallion	0	5 898	0	0	0
Other Crops	6 200	79 475	27 098	0	8 000
SUB-TOTAL	115 617	323 422	359 572	39 547	43 240
Livestock					
Cattle	32 027	29 860	26 300	22 462	15 602
Pasture	0	0	0		0
Small Stock (sheep, goat)	8 150	30 000	20 000	0	0
Piggery	63 525	33 360	275 972	20 123	178 512
Poultry	80 859	33 749	131 713	177 400	1 073 972
Fishing	36 236	1 550	4 397	1 500	3 000
Other Livestock	0	0	0.0	0	0
Bee Keeping	6 034	2 504	7 200	1 950	0
SUB-TOTAL	226 831	131 022	465 582	223 435	1 271 086
Export Crops					
Bananas	0	0	0	0	34 546
Cocoa	0	0	0	0	0
Coffee	13 295	10 560	0	0	4 361
Citrus	5 000	0	0	13 220	1 016
Sugar Cane	99 076	6 754	8 010	2 500	344 317
Papaya	0.0	1 000	2 000	0	0
SUB-TOTAL	117 371	18 314	10 010	15 720	384 240
Farm Infrastructure					
Farm Equipment	17 500	1 180	0	5 000	5 893
Farm Buildings	1 000	8 500	0	0	0
Farm Vehicle	25 538	16 775	10 000	4 963	6 550
Farm Store	14 900	2 628	0	9 264	3 600
biodigester	1 000	0	43 300	0	0
Other/Energy	4 600	0	0	0	323 000
SUB-TOTAL	64 538	29 083	53 300	19 227	339 043
Micro Financing Industry				61 576	72 097
TOTAL AGRICULTURE	**524 357**	**501 842**	**888 464**	**359 506**	**2 109 705**
AGRO-PROCESSING					
Agro-Processing Commodity	0.0	258 581	111 600	71 000	67 000
Food Processing	118 495	12 794	143 513	245 650	8 000
Beverages/Juices	93 000	0	12 000	0	0
SUB-TOTAL	211 495	271 375	267 113	316 650	75 000
GRAND TOTAL	**735 852**	**773 217**	**1 155 577**	**676 156**	**2 184 705**

Source: Development Bank of Jamaica

TABLE 10.11
QUARTERLY INTEREST RATES APPLIED TO AGRICULTURAL LOANS
JANUARY - DECEMBER 2013

LINES OF FUNDING	RATE TO AFI	RATE TO SUB-BORROWER
DBJ Regular	6.5	9.5
Dairy Revitalization	1.0	4.0
CDB	4.0	9.5
CDB/MOAF	4.0	5.0
PetroCaribe SME	5.0	9.5
PetroCaribe Energy	5.0	8.0
PetroCaribe (US$)	4.25	7.25
World Bank	4.5	7.5
DBJ Regular (US$) -AFI	5.25	8.25
DBJ - Direct	n/a	9.5

n/a - not applicable

Source: Development Bank of Jamaica

TABLE 10.12
AGRICULTURAL CREDIT, 2009 - 2013
(J$'000)

INSTITUTIONS	2009	2010	2011	2012[r]	2013[p]
Development Bank of Jamaica					
Total Loans Outstanding	2 438 303	2 440 733	3 461 736	2 422 924	2 853 903
Loans Issued (disbursed)	8 086 797	8 528 397	10 708 749	11 638 473	14 149 437
Loans Repaid	5 648 494	6 087 664	7 247 013	9 215 549	11 295 534
Commercial Banks					
Loans and Advances Outstanding	1 279 256	760 692	1 065 033	1 207 099	1 347 169

p - preliminary
r - revised

Source: Development Bank of Jamaica

– the intensification of government programmes to assist farmers with technology, markets and loan financing to promote growth in the industry. These programmes are expected to integrate primary producers into the value chain by linking them to buyers in the retail, hospitality and agro-processing industries.■

CHAPTER 11

MINING AND QUARRYING

INTRODUCTION

Real value added for the Mining & Quarrying industry increased by 3.8 per cent relative to 2012 (Figure 11A). The industry's contribution to overall GDP was 2.3 per cent relative to 2.2 per cent in 2012. The improved performance of the industry was due to a higher production of alumina, as there was a lower output of crude bauxite. The increase in alumina production was influenced by a higher global demand for aluminium which was reflected in higher output at West Indies Alumina Company (WINDALCO), Ewarton and Jamaica Alumina Company (JAMALCO).

Production challenges at JAMALCO in 2012 also affected output in January–March 2013. These issues were associated with:

— the difficulty in accessing bauxite used in the production of alumina at JAMALCO. This impacted efficiency since the time for extracting bauxite increased and made production relatively time-consuming.

— the quality of fuel which affected the efficiency of output at the JAMALCO plant.

However, these challenges were addressed by the April–June quarter, resulting in a higher output of the commodity from JAMALCO for the remaining nine months.

Production of crude bauxite at Noranda was adversely affected by the lower production resulting from the provisions made for a dredging project at Port Rhoades. This was reflected in quarterly declines for April–June and July–September 2013. The project, which was aimed at expanding berth space at the port and was slated to commence in April 2013, did not materialize.

World aluminium production increased in response to a higher demand for the commodity which was due to expansions in the automobile and packaging industries. Consequently, world consumption of alumina and crude bauxite were also higher. In addition, the anticipated tightening of crude bauxite supply due to the expected self-imposed ban by Indonesia on exports of the commodity influenced stockpiling by some countries.

The performance in the Industrial Minerals (Quarrying) sub-industry declined despite growth in three of the nine commodities.

Export earnings from bauxite/alumina increased due to the higher export volume of alumina as the volume of exported crude bauxite declined and lower average annual prices were recorded for both commodities.

POLICY & PROGRAMMES

The Mining & Quarrying industry represents a critical industry in the development of countries such as Jamaica that are endowed with exploitable mineral resources. Consequently, the objectives for the industry, as articulated in the Mining & Quarrying sector plan for *Vision 2030 Jamaica – National Development Plan* included: (i) the reinstatement of Jamaica's competitiveness in the bauxite & alumina sub-industry; and (ii) an improvement in gains from other mineral resources mainly through the development of value-added products using limestone.

The activities in the sector for 2013 were guided by these policies:

— The National Minerals Policy

— The Quarries Control Act.

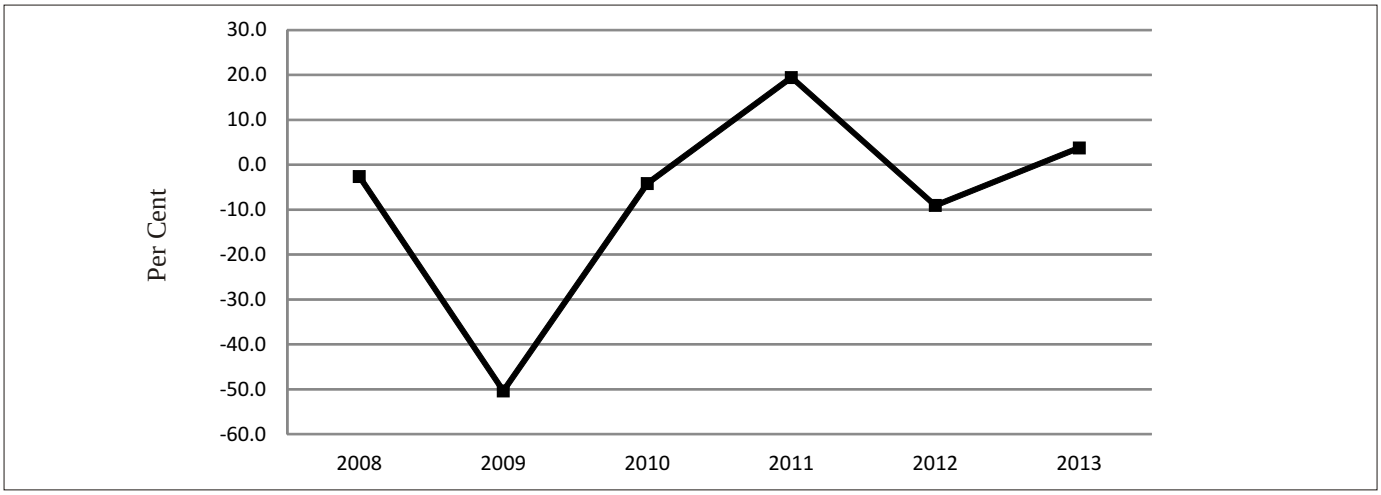

FIGURE 11A: REAL VALUE ADDED FOR MINING & QUARRYING 2008–2013

Other initiatives for 2013 included:

— Industry specific training and accreditation for the industry

— The divestment of Government of Jamaica's (GOJ's) assets in the bauxite & alumina sub-industry

— The marketing of non-metallic minerals

— Development of a bauxite and alumina minerals exploration project.

The **National Minerals Policy** – The Ministry of Science, Technology, Energy and Mining (MSTEM) revised the Draft National Minerals Policy with the assistance of the Inter-American Development Bank (IDB) in 2013. The draft policy aims to provide a framework for the sustainable development of the Quarrying sub-industry, focusing mainly on increasing private investment and creating linkages with other sectors in the economy. This supports the main target of creating internationally competitive industry structures, as outlined in the *Vision 2030 Jamaica – National Development Plan*, by providing an enabling environment. Accordingly, the policy, when promulgated along with its accompanying implementation plan, will identify strategies and actions with specified time horizons to address current and future challenges facing the industrial minerals sector. The document will be presented to Parliament by the second quarter of FY 2014/15.

The Quarries Control Act – A bill to amend the Quarries Control Act was submitted to Cabinet for consideration and the subsequent tabling in Parliament. The amended Act aims to develop and implement mechanisms that would result in a reduction of informality and illegal activities that continue to affect the quarrying sub-industry. On approval, the bill will require:

— qualified personnel to manage quarries

— promulgation of legislation and regulations that will address the transporting, storing and trading in illegally obtained quarry materials and quarry minerals

— modernization of mechanisms aimed at reducing illegal quarrying

— an improvement in the relationship between quarrying and other forms of land use.

Other initiatives for 2013 included:

Training Programme for the Mining & Quarrying Industry – The Mining & Quarrying industry requires an adequate supply of human resources with internationally competitive levels of labour productivity. In 2013, the development of a skills training programme for the qualification of required personnel continued. The programme is designed by the MSTEM in collaboration with the HEART/NTA and other stakeholders, and is projected to receive its first batch of students in September 2014.

GOJ's Assets in the Bauxite and Alumina Sub-industry – The GOJ finalized negotitations on the sale of its seven per cent interest in the United Company Rusal (UC Rusal) which manages West Indies Alumina Company (WINDALCO).

Marketing of Industrial Minerals – A new market for high-valued limestone was discovered in 2013, with Jamaica exporting 20 000 tonnes of clinker[1] to Venezuela. The transaction was conducted under the Trade Compensation Mechanism of the PetroCaribe Development Fund. The engagement of additional markets aligns with the aim to diversify and regain competitiveness in the Mining & Quarrying industry and to develop value-added products from limestone.

Bauxite and Alumina Exploration Project – The expansion of the bauxite and alumina sub-industry was a key goal for 2013 and this is expected to continue in 2014. Projects aimed at: (i) demarcating and quantifying the availability of bauxite; and (ii) establishing the viability of extracting rare earth minerals from red mud[2] waste associated with alumina were conducted.

INTERNATIONAL ENVIRONMENT

International Aluminium Market

Total world aluminium consumption grew by 7.5 per cent to 50 094.0 kilo tonnes as a result of increased demand from the automotive and packaging sectors. This higher consumption was influenced mainly by increased demand from Asia, up by 11.0 per cent to 33 463 kilo tonnes. Of this amount, China demanded 23 905 kilo tonnes, 14.4 per cent more than in 2012. Additionally, consumption in North America[3] grew by 2.2 per cent to 6 016 kilo tonnes, resulting from higher consumption volumes from all three countries, with Mexico recording the largest increase of 5.4 per cent to 530 kilo tonnes. The USA, however, accounted for the largest volume consumed for the region, amounting to 4 957 kilo tonnes from 4 869 kilo tonnes in 2012.

Total world production of aluminium increased to 50 029.0 kilo tonnes from 47 067.0 in 2012. The Asian region continued to drive growth in production with output of 31 416.0 kilo tonnes, an increase of 11.8 per cent. This growth was primarily attributable to increased production to 24 363.0 kilo tonnes by China, up 14.0 per cent. North America's production grew by 1.3 per cent, due to a 6.7 per cent increase in output amounting to 2 966.0 kilo tonnes from Canada. Europe's production fell by 4.5 per cent to 7 878.0 kilo tonnes. Global aluminium production capacity totalled 62 328 kilo tonnes, an increase of 7.0 per cent. The resulting capacity utilization rate of 80.0 per cent represented a decrease of 2.0 percentage points compared with 2012.

International Alumina Market

Total quantity demanded in the alumina market was 97 752 kilo tonnes, an increase of 4.8 per cent compared with 2012. This growth was driven by increased demand by China, up 9.5 per cent to 47 900 kilo tonnes. China continued to be the main

1 Clinker consists of lumps and nodules, usually 3–25 mm in diameter. It is produced by heating and compressing (without liquefaction) limestone and alumino-silicate (clay) during the cement kiln stage to form a solid or porous mass.

2 Red mud is a by-product of bauxite when it is refined to provide alumina.

3 The countries included in this category are Canada, Mexico and the United States of America.

TABLE 11.1
JAMAICA BAUXITE/ALUMINA PRODUCTION AND EXPORTS
'000 tonnes

	2009	2010	2011	2012 r	2013 p	% Change 2012/2011	% Change 2013/2012
PRODUCTION							
Crude Bauxite (a)	3 200.1	4 318.8	5 112.0	4 770.6	4 688.3	-6.7	-1.7
Alumina	1 773.6	1 590.7	1 959.9	1 757.7	1 854.9	-10.3	5.5
Bauxite Equivalent of Alumina (b)	4 617.4	4 221.1	5 076.9	4 568.7	4 746.9	-10.0	3.9
Total Bauxite Production (c)	7 817.5	8 539.9	10 188.9	9 339.3	9 435.2	-8.3	1.0
EXPORTS							
Crude Bauxite (a)	3 196.3	4 303.4	5 143.5	4 759.6	4 707.4	-7.5	-1.1
Alumina	1 884.0	1 575.3	1 959.2	1 753.5	1 901.8	-10.5	8.5
Bauxite Equivalent of Alumina (b)	4 907.6	4 182.8	5 074.4	4 554.6	4 866.0	-10.2	6.8
Total Bauxite Exports (c)	8 103.9	8 486.3	10 217.9	9 314.3	9 573.4	-8.8	2.8
Real Value Added Growth Rates(%) r	-50.4	-4.2	19.1	-8.7	3.7	n/a	n/a

r - revised
p - preliminary
n/a - not applicable
Note : (c) = (a) + (b)
Bauxite Equivalent of Alumina is unprocessed bauxite used in alumina production

Source: Jamaica Bauxite Institute

consumer of alumina, accounting for 49.0 per cent of world consumption in 2013 compared with 46.9 per cent in 2012.

In response to the increased demand for alumina, world production increased by 5.2 per cent to 100 097.0 kilo tonnes. Asia continued to be the leading producer, with overall output up by 11.9 per cent to 52 442.0 kilo tonnes, of which China produced 46 766.0 kilo tonnes. Conversely, South America recorded a decline of 6.1 per cent and there was no shipment of the commodity to Africa.

BAUXITE & ALUMINA SUB-INDUSTRY

DOMESTIC PRODUCTION

There was positive performance in the local mining industry. Output of alumina increased due to:

— higher demand from industrial countries

— an improvement in the production process at the JAMALCO plant.

This performance outweighed the decline in crude bauxite production, which was affected by lower planned production in anticipation of a dredging project at Port Rhoades. ALPART and WINDALCO's Kirkvine plants have remained closed since 2009, as operations at these plants are not viable at the current price of alumina.

Total Bauxite

Total bauxite production increased to 9 435.2 kilo tonnes from 9 339.3 kilo tonnes in 2012 (Table 11.1). This performance reflected a higher volume of Bauxite Equivalent of Alumina which outweighed the contraction in crude bauxite production. Additionally, the share of total bauxite used in the production of alumina increased to 50.3 per cent compared with 48.9 per cent in 2012.

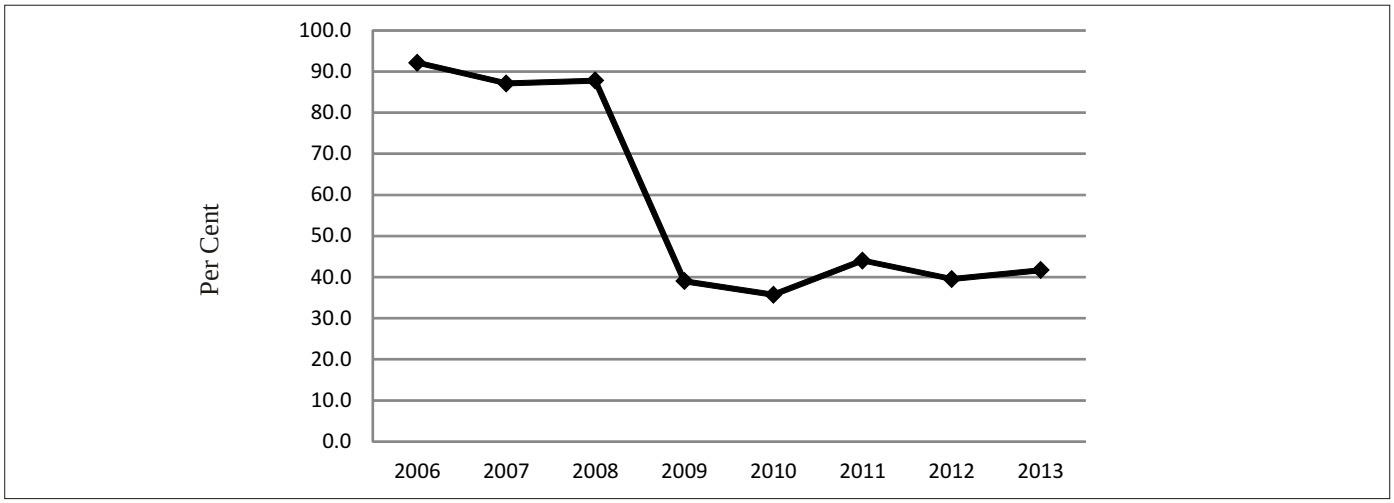

FIGURE 11B: ALUMINA CAPACITY UTILIZATION RATE

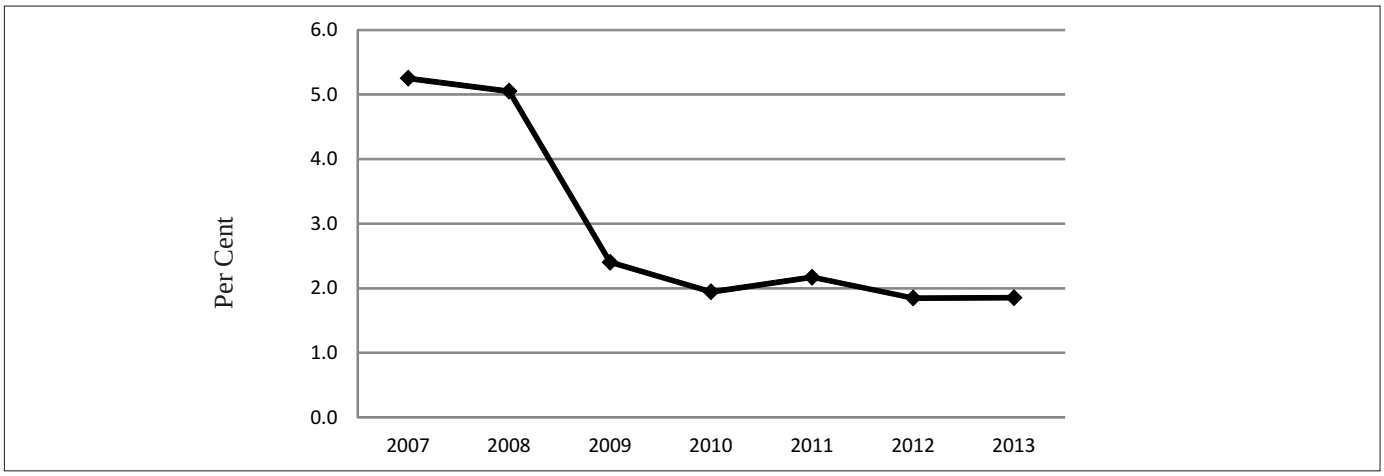

FIGURE 11C: JAMAICA'S ALUMINA PRODUCTION MARKET SHARE

Alumina

Production of alumina increased to 1 854.9 kilo tonnes from 1 757.7 kilo tonnes in 2012 (see Table 11.1). Higher production from the JAMALCO plant (up 4.8 per cent to 1 283.8 kilo tonnes) and WINDALCO's Ewarton plant (up 7.1 per cent to 571.1 kilo tonnes) influenced this out-turn which was commensurate with the increased demand for aluminium globally. The expansion in output reflected an improvement in the Alumina Capacity Utilization[4] (ACU) rate for the sub-industry which increased to 41.7 per cent relative to 39.5 per cent for 2012 (Figure 11B). The continued closure of ALPART and WINDALCO's Kirkvine plants limited further improvement in the total productive capacity utilization rate to a maximum of 46.7 per cent. The higher volume of alumina production resulted in a 0.1 percentage point increase to 1.9 per cent in Jamaica's share of the world alumina market compared with 2012. (Figure 11C).

Crude Bauxite

Production of crude bauxite declined from 4 770.6 kilo tonnes to 4 688.3 kilo tonnes in 2013 in response to a planned dredging of the Port Rhoades. The decline in this sub-industry resulted in the lower Bauxite Capacity Utilization (BCU) rate which fell from 90.9 per cent to 89.3 per cent in 2013 (Figure 11D).

EXPORTS

Global consumption of aluminium increased and was reflected in the higher volume of alumina shipped from Jamaica. Exports of crude bauxite, however, declined and stymied further increases in the industry's earnings for 2013.

Total Bauxite

Total bauxite exports increased to 9 573.4 kilo tonnes which represented a 2.8 per cent higher volume compared with 2012 (see Table 11.1). This reflected a 6.8 per cent increase in Bauxite Equivalent of Alumina exports to 4 866.0 kilo tonnes which outweighed a 1.1 per cent decline to 4 707.4 kilo tonnes in crude bauxite exports.

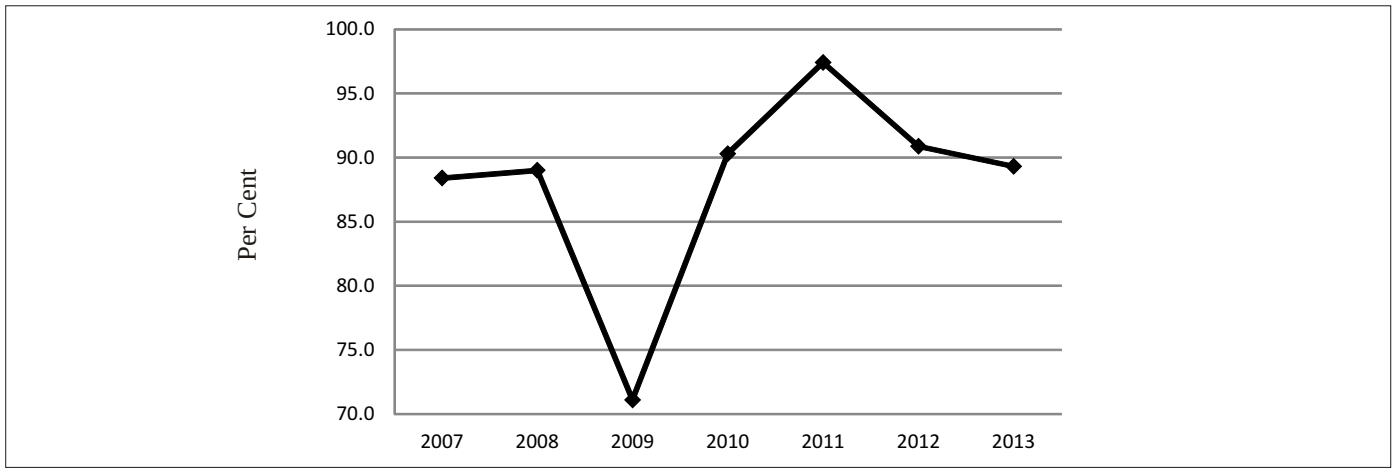

FIGURE 11D : BAUXITE CAPACITY UTILIZATION RATE

4 The Alumina Capacity Utilization rate measures the percentage of productive capacity utilized in the Alumina industry

TABLE 11.2
TOTAL VALUE OF EXPORTS & FOREIGN EXCHANGE EARNINGS
2009-2013 (US$ MILLION)

	2009	2010	2011	2012 r	2013 p	% Change 2012/2011	% Change 2013/2012
Crude Bauxite	85.4	128.7	147.8	142.5	128.3	-3.6	-10.0
Alumina	381.4	404.7	591.8	480.4	516.3	-18.8	7.5
Total Export Value	466.8	533.4	739.5	622.9	644.6	-15.8	3.5
Total Tax Receipts-(b)	19.6	13.1	20.6	15.1	12.3	-26.7	-18.5
Income Tax	0.0	10.0	4.0	0.0	0.0	-100.0	0.0
Bauxite Levy	19.6	3.1	16.6	15.1	12.3	-9.0	-18.5
Royalty (c)	7.1	3.7	2.7	4.6	4.7	70.4	2.2
Local Cost & Net Forex e -(d)	244.4	278.6	294.7	230.0	337.2	-22.0	46.6
Foreign Exchange Inflows (a)	271.1	295.4	318.1	249.1	354.2	-21.7	42.2

r - revised
p - preliminary
a - Net forex is earnings by Government owned entities in the Bauxite/Alumina subsector
(a) = (b) + (c) + (d)

Source: Compiled from data supplied by Jamaica Bauxite Institute

Alumina

The increase in the volume of alumina exported stemmed from a higher demand for the commodity from Jamaica's main export market – North America[5]. Of the two countries included in this category, the United States of America accounted for the largest improvement in the volume of shipments received with a 279.5 per cent increase to 161 973.0 tonnes. Canada recorded 668 562.0 tonnes relative to 296 178.0 tonnes in 2012 — the highest volume received by any of Jamaica's shipment destinations. This outweighed the declines in the other regions: Europe, down 4.2 per cent to 1 016.7 kilo tonnes; Africa, down 82.6 per cent to 7.1 kilo tonnes; and Other[6] territories, down 89.6 per cent to 30.8 kilo tonnes.

The decline in exports to Europe reflected the lower volumes demanded by:

— Montenegro, with no shipments relative to 3.0 kilo tonnes in 2012

— Latvia, with no shipments relative to 203.8 kilo tonnes in 2012

— Russia, down 55.2 per cent to 90.3 kilo tonnes.

Lower exports to Europe was mitigated by higher volumes shipped to the Netherlands (up 124.1 per cent to 367.6 kilo tonnes) and Poti, Georgia (up 19.3 per cent to 146.4 kilo tonnes). There were no shipments to Ghana which accounted for 87.2 per cent of total exports to Africa in 2012. There were no exports to China and Brazil, which combined, accounted for 20.0 per cent of deliveries to Other territories in 2012.

Crude Bauxite

The decline in the volume of crude bauxite exports[7] was attributed to planned dredging of Port Rhoades. The volume of crude bauxite exports fell from 4 759.6 kilo tonnes in 2012 to 4 707.4 kilo tonnes.

EARNINGS

The total value of exports for bauxite and alumina amounted to US$644.6 million, an increase of 3.5 per cent relative to 2012 (Table 11.2). This performance was influenced by a 7.5 per cent increase in the value of exports for alumina to US$516.3 million as the value of crude bauxite exports declined by 10.0 per cent to US$128.3 million (see Table 11.2). The increased alumina earnings was due to a higher export volume as there was a fall in the average export price from US$292.88 per tonne to US$271.50 per tonne. Lower crude bauxite earnings was due to a decline in the volume exported as well as a fall in the price from US$27.35 per tonne to US$27.25 per tonne.

Foreign exchange inflows grew during the year which reflected higher levels of activities compared with 2012. Total foreign exchange inflows were US$354.2 million, up 42.2 per cent from the figure reported in 2012. The amount remitted to cover local costs grew by US$107.2 million to US$337.2 million while the bauxite levy fell by US$2.8 million to US$12.3 million.

ALUMINA PRODUCTION COST AND EFFICIENCY MEASURES

The operating cost of production per unit of alumina decreased by 8.9 per cent to US$315.0 per metric tonne (Table

5 North America refers to the United States of America and Canada.

6 This category included China, Australia, Brazil and the United Arab Emirates.

7 Jamaica supplies crude bauxite to the Gramercy refinery in Louisiana and Sherwin Alumina Company in Texas.

TABLE 11.3
SELECTED COSTS OF PRODUCTION PER UNIT OF ALUMINA PRODUCTION IN THE BAUXITE/ ALUMINA SUB-INDUSTRY
2009-2013 (US$/Metric Tonne)

	2009	2010	2011	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
Bauxite	25.3	26.3	27.4	28.5	22.1	4.0	-22.4
Caustic Soda	38.5	29.2	35.9	35.8	35.4	-0.3	-1.0
Fuel/Energy	86.1	117.9	165.0	179.5	163.5	8.8	-8.9
Labour	14.1	15.5	17.3	18.4	16.9	6.4	-8.0
Other Operating Cost	53.3	79.2	74.0	83.6	77.1	13.0	-7.8
Operating Cost of Production	217.4	268.0	319.6	345.8	315.0	8.2	-8.9

p - preliminary
r - revised

Source: Compiled from data supplied by Jamaica Bauxite Institute

11.3). This reflected declines in the cost of all inputs per unit of alumina production. The lower cost of bauxite per unit of alumina fell by 22.4 per cent to US$22.1 per metric tonne. The costs of fuel/energy and caustic soda per unit of alumina production fell by 8.9 per cent to US$163.5 per metric tonne and by 8.0 per cent to US$16.9 per metric tonne, respectively.

The efficiency in the use of fuel, bauxite and caustic soda in the production of alumina increased as measured by the Fuel/Alumina (F/A), Bauxite/Alumina (B/A) and Caustic Soda/Alumina[8] (CS/A) conversion rates. Lower levels of the commodities were used in the production of alumina, with the largest improvement in efficiency recorded for bauxite, down 7.4 per cent to 2.5 tonnes of bauxite per tonne of alumina (Table 11.4).

INDUSTRIAL MINERALS SUB-INDUSTRY (QUARRYING)

There was a decline in the performance of the Industrial Minerals (Quarrying) sub-industry for 2013, despite growth in the Construction industry (Table 11.5).

Silica Sand

The production of silica sand in 2013 amounted to 15.8 kilo tonnes. This represented an increase of 13.8 per cent in the figure reported for 2012. Silica sand is used in the production of thin set. Higher output of the mineral was attributed to an increase in construction activities (see Table 11.5).

Limestone

Limestone production was 1 949.4 kilo tonnes, a decline of 12.7 per cent compared with 2012.

Gypsum

Production of gypsum amounted to 48.3 kilo tonnes, representing a decrease of 25.4 per cent compared with 2012. This decline was due to limited reserves at mines that are currently in operation.

Marble

The total production of marble for 2013 remained at 0.1 kilo tonnes. This industry continued to be severely curtailed by

TABLE 11.4
EFFICIENCY INDICATORS
2010-2013

	2010	2011	2012	2013	% Change 2012/2011	% Change 2013/2012
Fuel/Alumina consumption per tonne	1.90	1.99	1.96	1.94	-1.5	-1.1
Caustic Soda/Alumina consumption per tonne	0.11	0.10	0.09	0.10	-14.8	12.9
Bauxite/Alumina consumption per tonne	2.65	2.59	2.70	2.50	4.2	-7.4

Discrepancies due to rounding

Source: Compiled from data supplied by the Jamaica Bauxite Institute

8 The Caustic Soda/Alumina (CS/A) conversion rate measures the quantity of caustic soda used to produce one tonne of alumina. Thus an increase (decrease) in the CS/A conversion rate means that there is a decline (increase) in the average efficiency of using caustic soda in the production of alumina.

TABLE 11.5
PRODUCTION OF INDUSTRIAL MINERALS, 2009-2013
'000 tonnes

	2009	2010	2011	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
Silica Sand	6.8	13.0	14.0	13.9	15.8	-0.7	13.8
Limestone	1 913.8	1 956.1	2 451	2 232.6	1 949.4	-8.9	-12.7
Gypsum	156.9	147.1	79.5	64.8	48.3	-18.5	-25.4
Marble	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Sand and Gravel	2 600.0	2 750	2475.2	2 589.9	1 902.4	4.6	-26.5
Marl & Fill	2 055.0	2 155	1140.2	1 186.0	1 197.6	4.0	1.0
Pozzolan	132.5	139.5	130.4	107.2	112.3	-17.8	4.7
Shale	164.5	202.3	226.9	250.5	205.3	10.4	-18.1
Clay	81.0	5.0	4.2	300.6	12.0	7 057.1	-96.0

r - revised
p - preliminary

Source: Mines and Geology Division

high production costs and strong competition from imported marble and ceramic products.

Sand and Gravel

The production of sand and gravel decreased by 26.5 per cent to 1 902.4 kilo tonnes. This decline was attributed to reduced road improvement projects compared with 2012.

Marl and Fill

The total production of marl and fill was 1 197.6 kilo tonnes, an increase of 1.0 per cent compared with 2012 which was associated with the improved performance of the construction industry.

Pozzolan and Shale

The production of pozzolan increased by 4.7 per cent to 112.3 kilo tonnes while shale declined by 18.1 per cent to 205.3 kilo tonnes in 2013. Both minerals are key products in Portland cement production.

Clay

The production of clay declined from 300.6 kilo tonnes to 12.0 kilo tonnes in 2013. This performance was attributed to the completion of several construction projects in 2012 where the mineral was used primarily as a sealant.

EMPLOYMENT

Average employment in the Mining & Quarrying industry grew by 10.8 per cent to 5 400 persons, accounting for 0.5 per cent of the average total employed labour force. This indicated that the proportion of average total employed labour force accounted for by the Mining & Quarrying industry increased by 0.1 percentage points relative to 2012. An average of 4 900 males, an increase of 16.7 per cent, and 500 females, a decline of 25.9 per cent, were employed in the industry in 2013 relative to 2012.

OUTLOOK

Real value added for the Mining & Quarrying industry is expected to increase during 2014. This improvement is based on the demand for aluminium which will be generated from the growing aerospace and automobile industries in China and the USA. These industries are dependent on the use of aluminium as raw material. In addition, aluminium is gaining market share from numerous other materials, including copper, steel and glass, due to its lighter weight and relatively low cost. The local bauxite and alumina plants are expected to increase production to meet the anticipated global demand.

The Quarry sub-industry is also expected to increase its output during 2014. This is predicated on an increase in demand for quarry materials in the ongoing programme to rehabilitate several main and arterial roads throughout Jamaica. Limestone is expected to be the main driver for the sub-industry in 2014. This is due to work which will continue on the Courtyard by Marriot and the Playa Hotels & Resorts in 2014, boosting demand for cement locally. The availability of a new market for clinker in Venezuela also provides further growth prospects for limestone production. This is reflected in the number of new applications made for quarry licences.

The near exhaustion of gypsum at current sites necessitated exploration for new sources in 2013. It is expected that increased volume of the mineral will be extracted for local consumption and export in 2014.■

CHAPTER 12

MANUFACTURE

INTRODUCTION

Real value added for the Manufacture industry fell by 0.8 per cent during 2013 (Figure 12A). This stemmed from declines in both the Other Manufacturing and Food, Beverages & Tobacco sub-industries. The performance of the industry was impacted by demand and supply constraints. The demand for several locally manufactured products fell due to the manufacturers' inability to compete with international producers, as well as a decline in per capita income. On the supply side, a reduction in the replanting of sugar cane constrained the production of sugar. However, there was higher production for a few commodities, which partly reflected growth in related industries such as Construction.

The value of total manufactured exports amounted to US$772.5 million, which represented a reduction of US$166.4 million in earnings relative to 2012. The lower earnings reflected declines in both Traditional Exports and Non-Traditional Exports of 31.8 per cent and 14.9 per cent, respectively.

POLICY & PROGRAMMES

National Policy Framework

The policy framework for the Manufacture industry, which is consistent with Vision 2030 – National Development Plan, continued to be guided by the Ministry of Industry, Investment & Commerce (MIIC). Operations within the industry were enabled by several policies and programmes aimed at increasing competitiveness through improving the business environment, promoting innovation and enhancing productivity.

Omnibus Legislation

This legislation was passed in 2013 and overhauls the previous sector-based incentives to provide a generally competitive regime for all sectors. The main benefits to the Manufacture industry are: (a) duty free treatment of raw materials and capital goods; (b) allowances for investment through modernized capital; and (c) introduction of employment tax credits.

Marketing Initiatives

JAMPRO continued to develop and initiate activities geared at improving Jamaica's market penetration. Among the main initiatives for 2013 were:

— The continuation of the Export Max: Enterprise Development for Export Growth programme through which selected manufacturers receive technical assistance and financing options.

— JAMPRO Business-to-Business Linkages Event hosted in September 2013. This two-day event facilitated the realization of contracts amounting to $14 million as 108 buyers interacted with 109 locally based suppliers.

National Export Strategy (NES)

In 2009, a plan for boosting the country's export potential, namely the NES, was developed with an implementation period spanning April 2010 to March 2013. In 2013, the main activity undertaken was an assessment of the initiatives achieved over the three-year period. This was done by the NES Secretariat. The assessment will provide a detailed report of the accomplishments under the NES since April 2010. The main targets of the NES were to: (i) increase exports to GDP to 30.0 per cent; (ii) increase the contribution to employment from the export sector; (iii) reduce the ratio of imports to exports; (iv) diversify exports through the production of higher value added products, accessing new and emerging

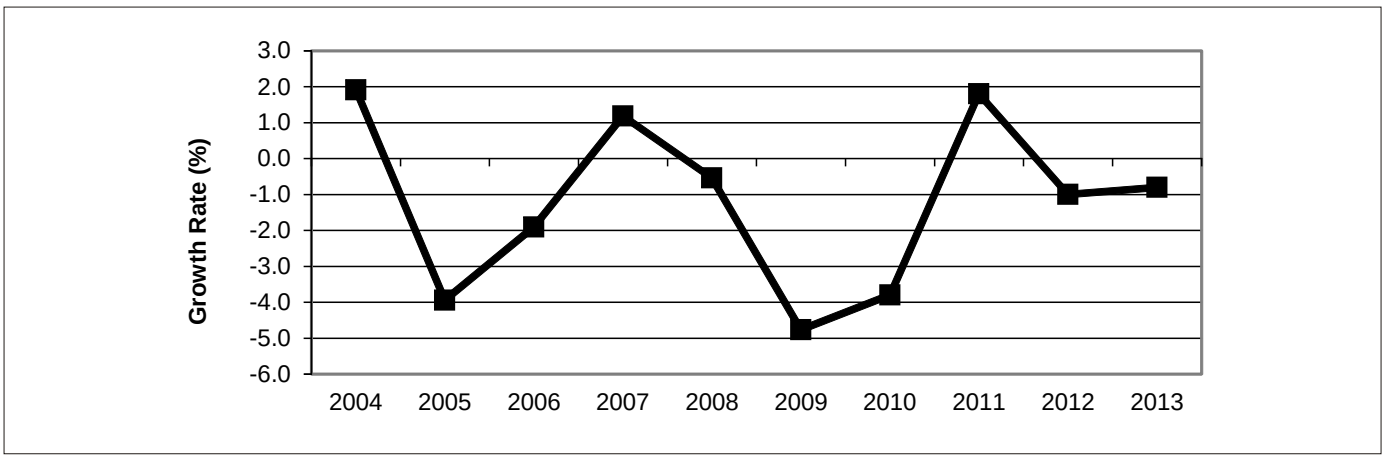

FIGURE 12A: CHANGE IN REAL VALUE ADDED FOR THE MANUFACTURE INDUSTRY

markets; and (v) create a competitive mind-set among manufacturers who have the potential to export.

National Competitive Council (NCC)

The NCC continued to fulfil its mandate of improving the business environment and ease of doing business in Jamaica. A total of 37 pieces of legislation were passed in 2013 to facilitate an improved business climate as well as implementation of some reforms that will improve the ease of doing business. Key among these initiatives impacting the Manufacture industry were: (i) the approval of Secured Interest in Personal Property Bill which allows individuals to pledge movable or personal assets as collateral to lending institutions; and (ii) the introduction of the Business Registration Super Form which captures all information needed by regulatory agencies for business registration at one portal.

The Scrap Metal Industry

Trade of scrap metal resumed on January 23, 2013 following a ban imposed on its export in July 2011. This resumption was facilitated by the establishment of the Trade (Scrap Metal) Regulations which outlined the rules for exporters of scrap metal, thereby reducing the challenges[1] associated with the export of the product. Among the regulations stipulated were the:

- licencing of each exporter as an approved exporter by the Minister of MIIC
- processing of metal for export at one of three approved multi-users sites located at Riverton; Spanish Town Road; and Clarendon Park
- categorizing of scrap as industrial and non-industrial scrap
- steps to be followed before processing or export can take place.

Bureau Of Standards Jamaica (BSJ)

Food Safety Modernization Act (FSMA)

Since the enactment of the FSMA by the United States of America in 2011, the GOJ has continued its efforts in aiding food processors to adhere to international food safety principles as well as prepare for increased inspections by the Food and Drug Administration (FDA). This has been done through the administration of the National Food Safety Task Force and Secretariat at the Bureau of Standards Jamaica (BSJ). They provided assistance to food processors to meet the safety requirements in preparation for FDA inspections. The National Food Safety Modernization Secretariat facilitated 18 inspections[2] in 2013, which were conducted at processed food establishments by the FDA.

In a pilot initiative, BSJ food inspectors served as "observers" during FDA inspections that were done in May and June 2013, and subsequently conducted re-inspections at entities where non-conformance was identified. With the re-inspections being conducted by the BSJ food inspectors, the cost to food processors was reduced. Additionally, the BSJ advanced work towards national accreditation for its three food testing laboratories. Accreditation will result in increased market access for Jamaican products as well as facilitate compliance with the FSMA.

During 2013, the BSJ published 50 Jamaican Standards (JS) and codes of practice, 10 of which were related to the Manufacture industry. The standards relevant to the industry focused on food management safety systems; quality management; and safety identification. Manufacturers also benefited from 65 training and development courses that were offered throughout the year. These included Good Manufacturing Practices; Hygiene Processing of Honey; Hazard Analysis & Critical Control Points (HACCP[3]) in general awareness and audit; Elements of Food Safety; and International Standards in several areas. The food processing sub-industry was the main beneficiary of most of the initiatives. The key areas of focus included the following:

- Encouraging the implementation of effective food safety practices which was done through hosting of two sensitization sessions in Montego Bay and Mandeville on the *JS 317:2012 Production of Processed Food Utilizing the HACCP Principles (General)*. This standard will become mandatory following its adaption in the processed food category.
- Implementation of a risk-based approach to inspections of processed food establishments as of July 2013 was undertaken to improve the BSJ's ability to monitor and conduct inspections of processed food factories. A system which ranks factories by their level of risk[4] was developed, which resulted in the BSJ increasing the frequency of inspections at factories ranked as high risk, thereby reducing the BSJ's financial cost and improving management of its human resources.
- Publication of the list of registered processed food establishments and the names of companies, along with food products of establishments registered under the Processed Food Act and *JS 36:1991 Processed Food (General)*, were made available on the BSJ's website. This was done to encourage compliance among food processors as well as to inform the public.

The implementation of the Bamboo Products Industry Project, which is aimed at creating standards for the bamboo industry, continued in 2013. Work on a draft Bamboo Industry policy commenced, with completion slated for early 2014. Six

1 The main challenge that hampered exports was the theft of valuable metals for trade, which resulted in damage to and loss of the country's infrastructure.

2 Since the enactment of the FSMA, 35 inspections have been conducted by the FDA with no regulatory action taken against any food facility.

3 The HACCP is a tool used to assess hazards and establish control systems to ensure the safety of food.

4 The risk management criteria used included: type of food produced and intended use; food preparation and processing, target population, equipment and infrastructure; product performance, employee training and competence; and history of regulatory compliance.

prototypes[5] were developed with the objective of producing high quality bamboo products that are commercially viable. Additionally, on the supply side, bamboo charcoal was distributed to jerk centres and supermarkets, while on the demand side, there was a contract from the Ministry of Education for 1 000 desks and 1 000 chairs made from locally manufactured bamboo plywood.

The Scientific Research Council (SRC)

The SRC continued to provide technical assistance to the Manufacture industry through workshops, training and seminars. The Food Processing component benefited from: a canning workshop with eight participants; juice processing training for 25 unattached youth in the Jacques Road Community; and practical sessions in food processing for over 150 tertiary students.

Jamaica Manufacturers' Association (JMA)

The JMA continued to support the Manufacture industry through: (i) the development of partnerships; (ii) the provision of technical support; and (iii) engagement of manufacturers in activities related to marketing and promotions. A key initiative geared at building capacity was the "Improving Packaging for Export Competitiveness" project which was launched in November 2012. This project lasted for eight months, with manufacturers benefitting from:

- product assessments to aid in the improvement of labels and packaging
- training in designing labels; meeting quality standards; and industry specification for labelling
- exposure to international market trends for packing materials and technology used in printing and packaging.

Additionally, manufacturers improved productivity through: increased capital investment; the acquisition of energy efficient equipment; and the expansion of plants to achieve greater efficiency.

Marketing & Promotions: The "Buy Jamaican, Build Jamaica" campaign continued with road shows in Mandeville and Portmore; as well as promotional activities targeting primary and secondary schools in the corporate area. The Caribbean Export Development Agency supported the JMA and JAMPRO to embark on a mission to the Dominican Republic. Approximately 50 business meetings with potential trading partners were facilitated through two business fora; site visits; meetings with select government and private agencies; and a tour of the Expo Cibao Trade Show.

Partnerships: the JMA entered into Memoranda of Understanding (MOU) with two institutions to facilitate the growth and development of the industry. The MOU between the JMA and the BSJ was aimed at the provision of training in local and international standards to members of the JMA. The other MOU was signed with The University of the West Indies, Mona, with the main objective of increasing research related to the industry, thereby enhancing product development particularly along a higher value added chain. The JMA was a part of the Tourism Linkages Council taskforces which aim at strengthening the linkages among the Tourism, Agriculture and Manufacture industries (see chapter on Tourism).

INVESTMENT

Expansions and New Investment in Manufacture

The majority of the investment in the Manufacture industry during the year stemmed from existing companies conducting expansions. These expansions resulted in job creation which accounted for 57.0 per cent of jobs created in the industry. A notable new investment is the establishment of a plant to produce transformers which is expected to employ approximately 24 workers when opened. The estimated value of the investment is $84.0 million and is slated for completion by the end of 2014.

PERFORMANCE

Producer Price Index[6] (PPI)

Producer prices within the Manufacture industry grew by 9.3 per cent during 2013. This increase was reflected mainly through the higher cost of raw materials and the depreciation of the Jamaica Dollar. The Food, Beverages & Tobacco index increased by 6.9 per cent and reflected higher indices for all subgroups. The subgroups with the largest upward movements were:

- *Manufacture of Dairy Products* –10.6 per cent
- *Manufacture of Grain Mill Products, Starches & Starch Products* – 9.5 per cent
- *Production, Processing & Preserving of Meats, Fish, Vegetables, Oils & Fats* –7.7 per cent
- *Manufacture of Beverages & Tobacco* –6.4 per cent.

Among the other major groups in the industry, Refined Petroleum Products and Other Non-Metallic Mineral Products registered the largest movements. With regard to Refined Petroleum Products, the index advanced by 18.3 per cent and was influenced by the higher price of crude oil on the international market. The index for Other Non-Metallic Mineral Products rose by 21.0 per cent due to increased prices for cement and concrete products associated with the depreciation of the domestic currency.

Production

The decline in real value added for the Manufacture industry resulted from respective declines of 0.1 per cent and 1.8 per cent in the **Food, Beverages & Tobacco** and **Other Manufacturing** components. Although there was a decline in the Food, Beverages & Tobacco sub-industries during 2013,

5 The six prototypes were: stylus for smart phones and tablet computers; charcoal; sawdust briquette; charcoal briquette; lumber; and spice blend bamboo charcoal capsules.

6 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 amount received by the producer from the purchaser for a unit of good or service produced as output. It excludes all deductible tax, suppliers' retail and wholesale margins and separately invoiced transport and insurance charges.

there was a notable improvement in the level of growth towards the end of the year. The pace of decline accelerated for the Other Manufacturing sub-industry at the end of the year.

Food Beverages & Tobacco

Food Processing

The Food Processing component is estimated to have declined due to reduced production for most commodities. The sugar and molasses commodities, which are heavily weighted in this component, were the main contributors to the decline. There were respective declines of 11.3 per cent and 27.1 per cent in the production of sugar and molasses mainly reflecting reduced output of sugar cane (Table 12.1). Of the other four commodities that registered decreased production, the largest absolute declines were for:

— Animal Feeds – down by 6 898 tonnes

— Edible Oils – down by 2 075 tonnes.

Increases were recorded for four commodities: Cornmeal (up 2.5 per cent), Dairy Products (up 5.0 per cent), Flour (up 0.4 per cent) and Poultry meats (up 1.7 per cent) {see Table 12.1}.

TABLE 12.1
OUTPUT OF SELECTED MANUFACTURED COMMODITIES 2009-2013

	UNIT	2009	2010	2011	2012r	2013p	% Change 2012/2011	% Change 2013/2012
FOOD BEVERAGES & TOBACCO								
Food Processing								
Poultry Meat	tonnes	103 860	104 203	101 165	101 509	103 263	0.3	1.7
Animal Feeds	tonnes	390 221	381 432	402 201	408 139	401 241	1.5	-1.7
Condensed Milk	tonnes	14 885	10 514	10 293	8 412	7 241	-18.3	-13.9
Edible Oils	tonnes	18 617	21 712	21 266	21 102	19 027	-0.8	-9.8
Edible Fats	tonnes	6 417	6 517	7 047	6 903	6 458	-2.0	-6.4
Flour	tonnes	136 782	136 798	134 510	136 132	136 702	1.2	0.4
Cornmeal	tonnes	10 240	6 343	5 128	6 318	6 478	23.2	2.5
Sugar	tonnes	130 500	121 034	143 195	136 645	121 138	-4.6	-11.3
Molasses	tonnes	57 679	56 412	63 664	58 870	42 923	-7.5	-27.1
Dairy Products	tonnes	3 868	4 386	3 864	3 648	3 832	-5.6	5.0
Beverages & Tobacco								
Alcohol (incl. rum)	'000 ltrs	22 636	18 494	19 367	22 747	25 239	17.5	11.0
Beer & Stout	'000 ltrs	69 204	65 516	58 343	50 226	41 868	-13.9	-16.6
Beer	'000 ltrs	54 179	53 203	46 400	38 359	28 138	-17.3	-26.6
Stout	'000 ltrs	15 025	12 313	11 943	11 867	13 730	-0.6	15.7
Carbonated Beverages	'000 ltrs	8 716	9 337	11 101	11 461	11 837	3.2	3.3
OTHER MANUFACTURING								
Chemicals & Chemical Products								
Acetylene	cu.mtrs	n/a	91 229	89 093	n/a	n/a	n/a	n/a
Sulphuric Acid	tonnes	10 826	5 469	6 928	1 010	0	-85.4	n/a
Aluminium Sulphate	tonnes	9 160	4 278	6 920	5 955	2 001	-13.9	-66.4
Sulphonic Acid	tonnes	4 323	3 875	4 381	1 009	0	-77.0	n/a
Salt (Nacl)	tonnes	14 412	14 232	14 001	14 587	14 166	4.2	-2.9
Fertilizer	tonnes	29 121	27 945	33 286	23 327	27 046	-29.9	15.9
Detergent	tonnes	1 568	392	367	387	0	5.3	n/a
Paint	'000 ltrs	10 767	9 249	9 765	9 479	9 401	-2.9	-0.8
Petroleum Products								
Gasolene	'000 ltrs	175 375	168 708	194 325	180 340	167 146	-7.2	-7.3
LPG	'000 ltrs	19 199	13 974	19 606	16 884	10 941	-13.9	-35.2
Fuel Oil	'000 ltrs	788 946	750 752	767 273	729 306	742 477	-4.9	1.8
Turbo Fuel	'000 ltrs	109 850	124 321	114 771	120 011	121 270	4.6	1.0
Automotive Diesel Oil	'000 ltrs	191 631	200 237	220 549	238 274	195 179	8.0	-18.1
Other Petroleum Products	'000 ltrs	28 842	37 141	46 263	43 733	44 513	-5.5	1.8
Non Metallic Minerals								
Cement	tonnes	736 919	723 489	766 274	760 296	824 828	-0.8	8.5
Plastic Products								
Other Plastic Products [a]	tonnes	10 987	10 270	10 663	11 363	n/a	6.6	n/a

a includes PET bottles

r - revised
p - preliminary
n/a. - not available

Source: Survey conducted by the PIOJ

Beverages & Tobacco

Two of the three subcategories, Rum & Alcohol and Carbonated Beverages, registered higher production volumes for 2013. Carbonated Beverages recorded an increase of 3.3 per cent for 2013 (see Table 12.1). This reflected higher production for all quarters except for January –March 2013. For Rum & Alcohol, there was an 11.0 per cent increase in production relative to 2012, which stemmed from greater demand as there were fewer factories operating during 2013. One of the four plants was closed throughout 2013 due to waste management challenges, while another plant was closed for September – December 2013 to facilitate maintenance activities. Despite these disruptions, production increased for all four quarters, albeit at a slower pace towards the latter half of the year.

The decline of 16.6 per cent in the production of the Beer & Stout subcategory was due to a reduced output of Beer due to a lower demand.

Other Manufacturing

Non-Metallic Minerals & Plastics

Production of Non-Metallic Minerals grew, with cement production increasing by 8.5 per cent to 824 828 tonnes in 2013 (see Table 12.1). The growth in cement production was pushed by higher demand associated with: (i) increased activities in the domestic construction industry; and (ii) improved international conditions facilitating more exports. Increased production was recorded for all quarters except January - March 2013.

Petroleum Products

There was a fall-off in the gross output for the Petroleum Products group, due to decreased production in the last six months of the year which offset growth in the first half of the year. Declines were recorded for three of the six product groupings, namely:

— Automotive Diesel Oil (down 18.1 per cent to 195 179 kilo tonnes)

— Gasolene (down 7.3 per cent to 167 146 kilo tonnes)

— Liquid Petroleum Gas (down 35.2 per cent to 10 941 kilo tonnes).

Chemicals & Chemical Products

This category declined during 2013 and was attributed mainly to reduced demand which resulted in factory closures and lower production levels. Of the seven commodities surveyed in this category, there was no production for three commodities — Sulphuric Acid, Sulphonic Acid and Detergent — in 2013 as the factories remained closed since 2012. The main reason for these closures was the high cost of production which caused the domestic product to be uncompetitive. The production of Salt and Aluminium Sulphate fell by 2.9 per cent and 66.4 per cent, respectively.

Production of ethanol also declined relative to 2012 although recording increased output for the first quarter of 2013. There was no production of ethanol for April –December 2013 due to the relatively higher price of the input used by the domestic producer compared with that of its international competitors. This resulted in the cessation of local production as it was deemed uncompetitive. Tempering the decline in this category was a 15.9 per cent increase in fertilizer production. This increase reflected higher production for the first nine months of 2013, which may be partly due to an upturn in domestic agricultural activities.

TABLE 12.2
TOTAL EXPORTS FROM THE MANUFACTURE INDUSTRY, 2009-2013
US$(000)

TRADITIONAL	2009	2010	2011	2012[r]	2013[p]	% CHANGE 2013 / 2012
Sugar	72 331	44 243	62 164	94 138	53 158	-43.5
Other Products	2 700	5 964	3 341	5 702	4 302	-24.6
Rum	48 397	47 197	48 706	55 654	48 178	-13.4
TOTAL TRADITIONAL EXPORTS	123 428	97 404	114 211	154 905	105 638	-31.8
NON-TRADITIONAL						
Processed Foods	79 733	82 613	94 771	114 898	121 261	5.5
Beverages & Tobacco	52 986	56 300	64 453	48 212	34 980	-27.4
Crude Materials	16 703	22 929	44 816	26 450	33 635	27.2
Mineral Fuels	213 568	291 209	371 763	387 742	351 223	-9.4
Animal & Veg. Oils	185	162	271.0	144	373	159.0
Chemicals (inc ethanol)	199 162	78 695	41 086	223 895	108 324	-51.6
Manufactured Goods	15 793	11 334	4 555	4 273	4 264	-0.2
Machinery Equipt.	1 750	512	8	401	2 100	423.7
Misc. Manufactures	7 011	12 033	10 176	9 841	10 704	8.8
TOTAL NON-TRADITIONAL EXPORTS	582 153	555 274	631 899	784 019	666 864	-14.9
TOTAL EXPORTS	705 581	646 723	746 110	938 924	772 502	-17.7

r: revised
p: preliminary

Source: Compiled from data supplied by STATIN

Exports

For 2013, total earnings from manufactured exports was US$772.5 million, 17.7 per cent lower than for 2012, reflecting reduced earnings for both Traditional and Non-Traditional Exports (Table 12.2). There was a fall-off of 31.8 per cent to US$105.6 million in the value of Total Traditional Manufactured Exports which was attributed to decreased earnings derived from all categories. Total earnings from the export of sugar and rum fell by 43.5 per cent to $53.2 million and by 13.4 per cent to $48.2 million, respectively (see Table 12.2).

The total value of Non-Traditional Manufactured Exports was US$666.9 million compared with US$784.0 million in 2012. This decline was due to lower export earnings for four of the nine categories. The Chemicals category accounted for the largest absolute decrease of US$115.6 million to US$108.3 million, due mainly to a fall-off in ethanol exports. The other commodities that recorded downturns were Beverages & Tobacco; Mineral Fuels; and Manufactured Goods. The decline in Beverages & Tobacco emanated from reduced earnings in Tobacco and Alcoholic Beverages (excluding Rum) as there was an increase in earnings from Non-Alcoholic Beverages. Among the categories registering increases, Processed Foods (up 5.5 per cent to US$121.3 million) and Crude Materials (up 27.2 per cent to US$33.6 million) had the largest upturns (see Table 12.2). Within the Crude Materials category, there were increased export earnings for all commodities. The major commodity "Waste and Scrap Metal" grew by 21.1 per cent reflecting the removal of the ban on the export of the product. The upturn in the Processed Foods category was due mainly to higher earnings from sauces, baked products, animal feeds and ackee exports.

Employment

Average employment in the Manufacture industry declined in 2013, consistent with the fall-off in production levels. Average employment was 71 875 persons compared with 76 950 persons in 2012. The share of employment in the Manufacture industry to the total labour force was 6.5 per cent and represented a 0.5 percentage point decrease compared with 2012.

The decrease in the average employment reflected declines in the number of males and females employed. The average number of males employed in the industry was 48 725 compared with 50 650 persons in 2012. The average number of females employed was 23 150, representing a decline of 3 150 persons compared with 2012.

FINANCING TO THE INDUSTRY

Loans & Advances to the Industry

At the end of December 2013, the stock of Outstanding Loans & Advances to the Manufacture industry held by the deposit-taking institutions was $12 969.0 million, 4.9 per cent higher than at the end of December 2012. This out-turn resulted from increases in the stock of Outstanding Loans & Advances at both Commercial Banks and Institutions Licensed Under the Financial Institutions Act (FIA).

Commercial Banks

At the end of December 2013, the stock of Loans & Advances to the Manufacture industry outstanding at commercial banks was $12 608.8 million, 4.5 per cent more than at the end of December 2012 (Table 12.3). This represents a slowing in the rate of increase as the stock of Loans & Advances outstanding at the end of December 2012 was higher by 55.2 per cent relative to the end of December 2011. The increase in loan stock relative to the end of December 2012 reflected higher loan balances for five of the nine categories. Of the categories with higher outstanding loan balances, the largest absolute increases were for:

— Paper, Printing & Publishing (up $98.8 million to $267.1 million)

— Other (up $602.1 million to $3 683.4 million)

— Food, Drink & Tobacco (up $1 046.4 million to $5 380.1 million)

Institutions Licensed Under the Financial Institutions Act (FIA)-Licensees

The stock of Loans & Advances to the industry outstanding at ***Institutions Licensed under the Financial Institutions Act*** to the Manufacture industry was $360.2 million at the end of December 2013 compared with $304.5 million at the end of December 2012. Conversely, this accounted for 5.1 per cent of the total loans disbursed by FIA – Licensees relative to a share of 5.3 per cent in 2012. There was a decline of $30.1 million in

TABLE 12.3
OUTSTANDING LOANS AND ADVANCES TO THE MANUFACTURE INDUSTRY BY COMMERCIAL BANKS, 2009-2013
$000

	2009	2010	2011	2012	2013	% Change 2012 2011	% Change 2013 2012
Categories							
Sugar, Rum & Molasses	422 804	112 238	233 324	1 871 640	752 464	702.2	-59.8
Food, Drink, & Tobacco	2 562 415	1 907 658	1 954 979	4 333 708	5 380 108	121.7	24.1
Paper, Printing &Publishing	132 431	128 022	116 819	168 266	267 076	44.0	58.7
Textile, Leather & Footwear	152 889	134 235	166 996	201 571	192 755	20.7	-4.4
Furniture, Fixtures & Wood Products	465 735	650 090	647 682	474 405	529 578	-26.8	11.6
Metal Products	355 426	379 154	237 634	228 327	214 530	-3.9	-6.0
Cement & Clay	1 003 793	1 089 639	981 037	884 134	941 606	-9.9	6.5
Chemicals & Chemical Products	943 525	648 803	374 787	819 764	647 356	118.7	-21.0
Other	3 353 946	3 245 306	3 058 036	3 081 236	3 683 370	0.8	19.5
Total	9 392 964	8 295 145	7 771 294	12 063 051	12 608 843	55.2	4.5

Source: Compiled by PIOJ from data supplied by BOJ

the stock of Loans & Advances at the end of December 2012 relative to the end of December 2011.

Local Development Financing Institutions

Total disbursements by the Development Bank of Jamaica (DBJ) to the Manufacture industry was $353.4 million relative to $871.4 million in 2012. The allotment for 2013 was apportioned to Agro-processing (down by 65.9 per cent to $87.4 million) and Manufacturing (down by 56.8 per cent to $266.0 million).

The National Export-Import Bank of Jamaica disbursed $1 635.5 million compared with $4 466.3 million in 2012. Of the total funds allocated to the industry by the Export-Import Bank of Jamaica, the following disbursements were made relative to 2012:

— Agro-processing - $580.6 million compared with $635.3 million

— Food & Beverages - $700.0 million relative to $2 319.8 million

— Textile & Wearing Apparel - $9.6 million compared with $28.3 million

— Other Manufacturing - $345.3 million relative to $1 482.9 million.

OUTLOOK

Real value added for the Manufacture industry is expected to grow in 2014. This out-turn is predicated on an increase in the Food, Beverages & Tobacco component, particularly sugar production. Additionally, with the continued work on the Tourism Linkages Sector, the demand for locally manufactured products by the tourism sector is expected to rise. The Other Manufacturing component should be boosted by continued increased activities within the Construction industry as well as a possibly higher production of petroleum stemming from projected increased economic activities in 2014.

Another key area from which the Manufacture industry is expected to benefit is increased exports. Jamaican exports will become more competitive as the real depreciation of the Jamaica Dollar will make Jamaican goods cheaper internationally, thereby resulting in higher production for exports. Among the initiatives geared at increasing exports are Phase II of the National Export Strategy (NES) and Export Max II, both of which will be launched in 2014. The second phase of the NES will have agro processing as a main priority sector which will benefit from trade facilitation, capacity building and improved innovation and technology to enhance production. The Export Max II has an objective to increase export sales within the next three years by improving marketing for 20 export companies. ■

CHAPTER 13

MICRO AND SMALL ENTERPRISES

INTRODUCTION

For 2013, Micro and Small Enterprises[1] (MSEs) continued to receive support from public sector, private sources and international development partners. Among the initiatives geared at MSEs were improving the business environment; increasing financing, particularly to the micro enterprises; and building the technical capacity of MSEs. The government was successful in the delivery of several pieces of legislations which will serve to benefit MSEs and contribute to their increased impact on the economy. There was a general increase in the disbursement of loans to the sector, however, this was not reflected in the preliminary 2013 General Consumption Tax gross sales by MSEs. Jamaica's ranking fell from 90 out of 185 countries in 2013, to 94 among 189 countries surveyed for the *2014 Doing Business Report*[2].

For 2013, there was growth in the volume and value of loans disbursed by most entities surveyed. Total disbursement by selected retail lenders increased by 90.1 per cent to $7 200.7 million, due to higher disbursements by all except COPE Foundation which was closed in 2012. However, there was a decline of 17.0 per cent to $2 288.0 million in total disbursement by selected wholesale lenders. The number of registered MSEs amounted to 9 996 compared with 10 175 in 2012, reflecting fewer firms registered in both the micro and small enterprises. Most of the loans disbursed were to MSEs engaged in Wholesale & Retail Trade industry, this was consistent with Wholesale & Retail Trade accounting for the largest share of registered MSEs businesses.

The Statistical Institute of Jamaica's *Labour Force Survey* regarding Employment Status for 2013 showed that the Own Account Worker (sole traders) category, which constitutes the vast majority of MSEs, accounted for 36.2 per cent of the employed labour force compared with 36.4 per cent in 2012. The average employment of Own Account Worker for 2013 was 401 575 persons, of which males accounted for 263 500 persons. For 2012, Own Account Worker had an average employment of 402 150 persons, 263 975 were males.

POLICIES & PROGRAMMES

In alignment with the goals of *Vision 2030 Jamaica — National Development Plan*, the Ministry of Industry, Investment & Commerce focused on stimulating investments, addressing the constraints identified in the Doing Business and Global Competitiveness reports, and facilitating business. The main areas that impacted MSEs were policy development, programmes enhancement for international competitiveness, and financial assistance for MSEs and new entrepreneurs.

Micro, Small & Medium Enterprises (MSME) and Entrepreneurship Policy

This policy, which intends to establish a comprehensive and cohesive framework for fostering MSMEs, was tabled in July 2013. The policy was later launched in October 2013 as part of the Global Entrepreneurship Week[3] (GEW) activities. The integration of small businesses into the supply and value chains related to the global logistics hub initiative will be an essential part of the policy strategy. Implementation of the policy will commence with activities relating to the identification of financing mechanisms for MSMEs.

National Competitiveness Council (NCC)

During 2013, the NCC continued to oversee the implementation of key business environment reforms to improve the ease of doing business and to advance Jamaica's competitiveness. The main reforms that were implemented through facilitation by the NCC, focused on improving access to credit, and the process of re-starting a business and paying taxes. Among the legislative initiatives achieved in 2013 were:

- ***Secured Interest in Personal Property Bill*** which was passed in December 2013. This will improve the availability of credit as assets including intellectual property and moveable property can now be used as collateral. To complement this legislation, an online collateral registry was developed in December 2013 and is administered by the Companies Offices of Jamaica (COJ)
- ***Introduction of the Business Registration Super Form*** in December 2013. This was designed as a 'one stop shop' for business registration as all information required by regulatory agencies will now be captured at the COJ. This will result in time and cost savings as the need to fill out several forms at multiple agencies has been eliminated
- ***The passage of the Trade Marks Bill*** in Parliament in July 2013 and aims to further improve the business en-

1 Micro-enterprises in Jamaica are defined as enterprises that carry an annual turnover of less than or equal to $10 million and less than or equal to 5 employees. Small Enterprises carry an annual turnover of more than $10 million but less than or equal to $50 million with employment greater than 5 but less than or equal to 20 employees.

2 This report looks at regulation that enhance and/or constrain business activities in the countries surveyed. The data in *Doing Business 2014* are current as at June 1, 2013.

3 Global Entrepreneurship week is held annually in November and represents the world's largest celebration of innovators and job creators, who launch start-ups that bring ideas to life, drive economic growth and expand human welfare.

vironment through modernizing the framework for intellectual property. Key features of the bill are provision for revocation of a trademark due to disuse for a period of five years without good reason; establishing Jamaica Intellectual Property Office (JIPO) as the organisation responsible for registrar duties under the Act; and implementing a 'cooling-off period' during proceedings to oppose the registration of a trademark

– ***Insolvency Bill*** was tabled in December 2013 and upon enactment will result in reduced costs associated with business failures. The rules and procedures for handing corporate and personal insolvencies will be modernized thereby encouraging more businesses to re-start after a failure

National Export Strategy (NES)

The NES, developed in 2009, was aimed at boosting the country's export potential over a three-year implementation period spanning April 2010 to March 2013. Thus in 2013, the implementation period of the NES ended and the NES Secretariat commenced a review process to assess initiatives undertaken over the three-year period and its impact. This assessment will provide a detailed report of the accomplishments under the NES since inception. The initial targets included: (i) increasing exports to 30.0 per cent of GDP; (ii) increasing the contribution to employment from the export sector; (iii) reducing the ratio of imports to exports; (iv) diversify exports through the production of higher value added products, accessing new and emerging markets; and (v) creating a competitive mind-set among manufacturers who have the potential to export.

Inter-American Investment Corporation's FINPYME Export Plus

This programme, which was launched in October 2012, was aimed at enabling Small and Medium Enterprises (SMEs) to improve their competitiveness and have greater access to export markets. Two workshops held for registered exporters were:

– Financing for Innovation – where exporters interacted with financial institutions. Representatives from these institutions outlined the requirements for preparing financial proposals, while exporters made suggestions on how they could be better served by these institutions

– Accessing Benefits Under Trade Agreements - SMEs gained information on trade agreements to which Jamaica is a signatory on how best these agreements can benefit their exports especially in terms of market access and penetration

Global Logistics Hub Initiative

This initiative seeks to position Jamaica as the fourth node in the global logistics chain along with Rotterdam, Netherlands, Dubai, and Singapore. Specifically, Jamaica is positioning itself to take advantage of the expected increase in shipping activities associated with the expansion of the Panama Canal. The logistics hub is envisioned to integrate the Port of Kingston with (i) facilities to enable warehousing, distributing, assembling and manufacturing; and (ii) several modes of transportation. This will maximize supply chain efficiencies while minimizing the cost between origin and destination of a product. A National Logistics Initiative Council was developed to coordinate the efforts of government and non-government stakeholders responsible for enhancing capacity to attract and facilitate investments in hub initiative. It is anticipated that MSMEs will integrate into the supply chains existing in the hub. In light of this, a series of islandwide public consultations with emphasis on the role of MSEs in the initiative was held. The development of an awareness programme in collaboration with Caribbean Maritime Institute on the basics of logistics and the implications of the logistics hub on the economy was achieved.

Mobile Money for Microfinance Pilot Project

Following approval of the pilot project by Bank of Jamaica in June 2012, there was an official launch in February 2013. This initiative provides a digital mobile network platform for conducting various financial service transactions, and will increase access to financing particularly for the microfinance sector. Additionally, there is the benefit of reduced cost from using mobile phones for transactions for both disbursing loans and collecting payments.

DEVELOPMENT AND BUSINESS SERVICES

A number of government agencies continued to provide developmental and business services to the MSEs. These included: the Scientific Research Council (SRC); Jamaica Business Development Corporation (JBDC); Technology Innovation Centre (TIC), University of Technology, Jamaica; and the Bureau of Standards, Jamaica (BSJ). Additionally, services were provided by the private sector and multilateral agencies.

Scientific Research Council (SRC)

The SRC provided support to MSEs by conducting science and technology workshops, and training in food processing. Clients were facilitated in the areas of the Food Processing sub-industry through a canning workshop (8 participants); juice processing training (25 participants); as well as practical sessions in food processing to 150 tertiary students.

Jamaica Business Development Corporation (JBDC)

The JBDC engaged 3 902 MSMEs, which benefited from business and technical support services. There was an increase of 3 309 to 10 693 in the number of interventions[4] administered in 2013 (Table 13.1). This upturn emanated from an increase of 93.6 per cent in assistance within Business Advisory Services category as interventions in all other categories declined. Under the Business Advisory Category, the following were the main initiatives:

– a total of 6 894 business consultations were conducted possibly owing to new customers accounting for 53.0 of the total MSMEs engaged during the year.

– 96 training sessions were held in which 1 459 persons were trained in the areas of taxation, costing & pricing, online marketing, and business idea generation, among others.

4 An intervention is the delivery of products and services by JBDC to each client and entity.

As of December 2012 the JBDC ceased its lending operations, as such no loans were disbursed by the JBDC in 2013. This compares with a disbursement of $40.2 million in 2012.

Training

The sixth annual Small Business Expo was held in May 2013 under the theme *'Taking Business to the Next Level from Self-employment to Entrepreneurship'*. A total of 850 participants benefited from 35 exhibits from selected companies, 12 workshops, and 6 panel discussions. Speakers delivered topics under the following themes: *Inside the Entrepreneurial Mind; Developing the Entrepreneurial Mindset; Turning your Passion into a Real Business; Developing the Business's Biggest Brand; The Art of Reinvention; Identifying the Right Wealth Management Strategy;* and *Transitioning to the Next Level.*

A Proposal Writing Intervention programme was conducted in November – December to assist participants in developing project proposals, thereby improving their ability to solicit assistance for business development purposes. A donor registry was distributed to participants who consisted of individuals within MSME sector as well as those who provide support to MSMEs. Five proposals were developed with three received funding valued at $14.5 million.

Development Bank of Jamaica (DBJ) and JBDC MOU

The JBDC and the DBJ entered into a Memorandum of Understanding in 2012 to implement three projects to assist MSMEs. During April - October 2013, all three were facilitated with the following activities:

- *Small Business Growth and Distribution Linkages* – development of a concept that is aligned with international standards for product development and packaging
- *JBDC "Craft Biz" Facility* – provided training in selected business topics; rendered assistance in enhancing and developing products; supplied promotional and product branding solutions; and provision of hand-holding and guidance for business plan writing, sourcing of raw material and equipment
- *MSME Energy Conservation and Efficiency Project* – established an energy audit unit at JBDC; facilitated the training and certification of four energy managers to boost the JBDC experts; developed an energy tip booklet and MSME Energy Management Manual; and provided training and sensitization on basic energy management techniques to selected manufacturers.

Jamaica Social Investment Fund (JSIF) Leather Craft Project

A programme to provide training on Leather Craft and Business Development Skills for select individual in JSIF beneficiary communities was designed and executed by the JBDC. The training programme was held from June – August 2013 and was delivered to 20 young persons from inner-city communities in St. Catherine. During the nine weeks of training, participants were taught in areas such as: construction techniques; designing & stamping leather; pattern making; hand-stitching; and dyeing. At the end of programme the output by participants were wallets, purses and belts (woven and dress).

C-FISH Alternative livelihood product development initiative

Caribsave contracted the JBDC to establish and support alternative livelihoods in areas around two fish sanctuaries — Bluefield's Bay, Westmoreland; and Oracabessa/Boscobel, St. Mary. This project commenced in June 2013 and achieved the delivery of product development workshops on: (i) making of tote bags and greeting cards in Bluefield's Bay; and (ii) jewellery in the Boscobel Community.

North Coast Craft Revitalization Project

This project is a collaborative effort between the JBDC and the Tourism Enhancement Fund and is aimed at improving the competitiveness and income generation capabilities of craft producers in the north coast region. The project, started in May 2013, is slated to be completed by April 2015. Craft producers

TABLE 13.1
JBDC ACTIVITIES

Products & Services	Description of Interventions	Number of Interventions 2012	Number of Interventions 2013
Business Advisory Services	Business advice and mentoring, business plan preparation and analysis, programme and project management, business training, assessment of entities and preparing them to access financing and referrals to technical and financial institutions	4 547	8 804
Technical Services	Technical assistance such as product design and development, business incubation management, plant and production engineering, food technology, customised hands-on workshops, prototype and product development, branding, fashion and graphic design, pattern-making and packaging and labelling services	1 312	933
Marketing Assistance	Retailing – Things Jamaican Stores; Marketing Consultation – Screening of Products; Market Research; Market Access – Participation in trade shows and expositions	976	956
Financial Services	Business Development Loans; Financial Brokerage Services – loan and grant funds on behalf of other agencies; Financial advice and monitoring	549	0
TOTAL		**7 384**	**10 693**

Source: Jamaica Business Development Corporation

in St. Ann, St. James and Trelawny were targeted. The main objectives were to improve the business and technical competencies, develop and strengthen the quality of products, and increase promotion and market access.

Technology Innovation Centre (TIC) – University of Technology, Jamaica

MSEs received continued support and assistance from the TIC particularly through its incubation services. The partnership with the HEART Trust /NTA continued in 2013 with TIC clients receiving training in entrepreneurship. The number of clients which participated in incubation programmes at the end of 2013 was 34 compared with 49 at the end of 2012. This was disaggregated as follows:

- *Associate Platinum Programme* which accommodates shared offices for clients from varying background was the sole programme to record an increase with 16 clients relative to 14 in 2012
- *Virtual Programme* is for clients who wish to have a business address but work from home or in the field had 6 participants relative to 14 in 2012
- *Anchor Tenancy Programme* had four clients similar to 2012, this programme facilitates stronger clients who assist with the incubator programmes.
- *Residential Programme* had three clients occupying three office spaces compared with seven clients occupying eight offices in 2012
- *Student Incubator Programme* is geared at business persons who are students. There were three clients participating in 2013, one less than in 2012
- *Associate Premium Programme* offers space with internet, telephone and a desk on a first come basis and had two participants relative to six in 2012

Bureau of Standards Jamaica (BSJ)

The MSMEs continued to receive support from BSJ in the areas of capacity building, improving competitiveness, and offering discount services. The BSJ as part of an agreement with JAMPRO continued to provide a discount of 50.0 per cent on laboratory and other services to selected agro-processors under JAMPRO's ExportMax programme. This agreement ended in November 2013 with discounts totalling $2.9 million for 2013 compared with $3.7 million in 2012 to agro-processors. As part of BSJ/Business Partnership Programme, which focuses on building human capacity in Business Support Organizations (BSO), five persons were trained as trainers. These trainers will transfer information to their respective members on implementing standards and quality systems.

The BSJ participated in various events via presentations and exhibits to build awareness on the importance of standards. Among the main focus at these events were product/plant certification programmes; the bamboo products industry project; energy management seminars related to ISO 50001; and food safety. Additionally, the Bureau offered a total of 65 training and development courses to 761 persons.

The continued implementation of ***Bamboo Products Industry Project***, which seeks to develop and commercialize quality bamboo products, was a main focus for 2013. The main deliverables under the project were:

- the drafting of a Bamboo Industry Policy which is slated for completion in January 2014
- development of six prototypes such as stylus for smart phones and tablet computers, charcoal briquette, and spice blend bamboo charcoal capsules
- completion of the bamboo charcoal pilot project, which yielded the successful collection and separation of vinegar and tar as by-products
- securing a contract to supply the Ministry of Education with 1 000 desks and 1 000 chairs using locally manufactured bamboo plywood
- successful distribution of bamboo charcoal in the marketplace such as jerk centres and supermarkets.

USAID/Jamaica

The United States Agency for International Development (USAID) continued to support the MSEs by providing access to credit, technical assistance, and promotion of entrepreneurship. USAID credit support to the MSEs continued through the Jamaica National Small Business Loans Ltd. programme. Technical support was continued through Development Grants Programs (DGP) such as the Competitiveness Company, Local Initiative Faculty for the Environment, INMED Partnerships for Children, Environmental Health Foundation, Jamaica National Building Society Foundation and Agency for Inner-City Renewal.

A new recipient of DGP in 2013 was the Rose Town Foundation for the Built Environment. The programme aimed to improve the community's water and sewage infrastructure and thereby increase the income potential of businesses in the community. USAID also continued its support of the Junior Achievement (JA) Jamaica programme, which is geared at building entrepreneurial skills at the youth level. Under this programme more than 10 000 individuals aged 5 to 24 participated in programmes on business education through financial literacy, entrepreneurship and work readiness. Additionally, there was the introduction of the JA Company programme which assisted in building entrepreneurial skills by allowing individuals to organize and operate a business enterprise for six months.

PERFORMANCE

There was a decline of in the number of MSEs engaged in business activities as fewer firms were registered in both the micro and small enterprises. The number of registered MSEs amounted to 9 996 compared with 10 175 in 2012. Combined, micro and small enterprises accounted for 80.4 per cent of GCT registered companies, down 0.2 percentage point relative to 2012. Based on the total MSEs that filed GCT returns, 4 303 were aligned to the Wholesale & Retail Trade industry relative to 4 353 in 2012, followed by Real Estate & Professional Services with 2 285 compared with 2 253 in 2012 (Table 13.2).

Preliminary GCT data revealed that sales (in real terms) by MSEs totalled $50.1 billion relative to $55.7 billion in the previous year. Despite accounting for the majority of registered firms, overall sales by MSEs represented 5.9 per cent of income generated by all the companies that filed returns. The lower out-turn was tempered by increased sales in Energy & Water and Mining industries (Table 13.3).

TABLE 13.2
NUMBER OF MSEs ACCORDING TO GCT RETURNS, 2011- 2013

	2011[r]		2012[r]		2013[p]	
INDUSTRIES	**Micro**	**Small**	**Micro**	**Small**	**Micro**	**Small**
Agriculture	76	45	87	44	86	37
Mining	32	8	30	9	26	9
Manufacturing	484	297	458	285	439	269
Energy & Water	10	6	13	1	12	2
Construction	324	104	329	104	317	94
Wholesale & Retail Trade	2 632	1 784	2 553	1 800	2 515	1 788
Miscellaneous	385	149	347	163	310	163
Transport & Communications	402	173	403	165	370	176
Financial Services	145	77	145	83	149	83
Real Estates & Professional Services	1 632	571	1 665	588	1 699	586
Government Services	41	12	46	10	40	12
Other Services	602	272	570	277	557	257
TOTAL	**6 765**	**3 498**	**6 646**	**3 529**	**6 520**	**3 476**

r - revised
p - preliminary

Source: Compiled by the PIOJ from data received from eGov Jamaica Limited

FINANCING

The Government of Jamaica continued to make funds available to the MSEs through wholesale lenders—Sagicor Bank Jamaica Limited[5], the Micro Investment Development Agency, and the Development Bank of Jamaica. Total disbursement to the SMEs by wholesale lending agencies surveyed was $2 288.0 million, relative to $2 757.1 million in 2012 (Table 13.4).

Wholesale Financing

Sagicor Bank Jamaica Limited (SBJL)

SBJL continued to monitor the GOJ/EU Micro and Small Business Lending Scheme through the provision of loans to Participating Credit Institutions (PCIs). SBJL disbursed $49.7 million to PCIs, compared with total disbursement of $96.9 million in 2012. A total of 1 307 loans valued at $61.9 million was disbursed by the PCIs relative to 2 004 loans valued at $96.4 million in 2012. Loans were made to MSEs engaged in agriculture, trading, services, and manufacturing.

Development Bank Jamaica Limited (DBJ)

A total of 5 556 loans valued at $1 379.0 million were approved for MSEs relative to 6 703 loans valued at $989.3 million in 2012. The higher value in approved loans was due to increases in all disbursement channels, with Approved Financial Institutions (AFI) accounting for the largest increase. The value of loans disbursed amounted to $1 136.9 million, representing a decline of 28.6 per cent compared with 2012 (see Table 13.4). Of the funds disbursed in 2013, the allocation by channel was:

Table 13.3
MSEs Sales ACCORDING TO GCT RETURNS, 2011- 2013
($ MILLION)

	2011[r]		2012[r]		2013[p]	
INDUSTRIES	**Micro**	**Small**	**Micro**	**Small**	**Micro**	**Small**
Agriculture	125.4	631.7	147.6	580.6	134.0	436.3
Mining	37.7	109.1	32.2	118.4	19.2	134.1
Manufacturing	870.0	4 157.6	791.5	3 691.2	674.8	3 237.2
Energy & Water	4.3	70.0	11.9	7.0	11.2	14.8
Construction	453.1	1 237.3	424.1	1 268.0	367.4	962.1
Wholesale & Retail Trade	5 119.8	24 248.1	4 551.5	22 980.5	4 106.4	20 833.9
Miscellaneous	735.5	1 991.4	638.5	2 140.6	524.2	1 859.3
Transport & Communications	689.7	2 317.9	637.6	2 070.4	537.8	1 939.0
Financial Services	204.9	1 062.6	197.5	1 089.3	186.7	1 031.2
Real Estates & Professional Services	2 898.9	7 353.1	2 668.7	7 070.4	2 462.5	6 606.8
Government Services	57.9	176.0	70.9	142.3	47.9	161.8
Other Services	1 112.6	3 507.0	971.4	3 358.0	853.3	2 923.8
TOTAL	**12 309.9**	**46 861.9**	**11 143.3**	**44 516.7**	**9 925.5**	**40 140.4**

r - revised
p - preliminary

Source: Compiled by the PIOJ from data received from eGov Jamaica Limited

5 The SBJL is the Government of Jamaica appointed wholesale agent to provide loans to Participating Credit Institutions for on-lending.

TABLE 13.4
DISBURSEMENTS BY WHOLESALE AGENCIES, 2009 - 2013
($Million)

AGENCIES	2009	2010	2011	2012[r]	2013	%Change 2013/ 2012
Development Options Limited	186	n/a	n/a	n/a	n/a	n/a
Pan Caribbean	50.7	64.5	76.9	96.9	49.7	-48.7
Micro Investment Development Agency	153.4	95.8	146.1	136.8	166.2	21.5
National Insurance Fund	228.5	921.9	n/a	930.2	935.2	0.5
Development Bank of Jamaica	980.7	661.7	n/a	1 593.2	1 136.9	-28.6
TOTAL	**1 599.3**	**1 743.9**	**223.0**	**2 757.1**	**2 288.0**	**-17.0**

n/a-not available
r - revised

Source: Compiled by the PIOJ using data received from MIIC and Respective Funding Programmes

– AFI – $31.3 million, down $555.2 million

– Micro Finance Institutions – $418.2 million, down $126.4 million

– National Peoples Co-operative Bank (NPCB) – $635.0 million, up $172.9 million

– Direct – $52.5 million.

Analysis done by category revealed that the reduction in disbursement was attributed to Services & Transportation (down 86.7 per cent to $76.9 million) and Distribution (down $55.3 per cent to $105.2 million) categories. Agriculture & Agro-Processing received the largest disbursement, $716.8 million, an increase of 0.4 per cent relative to 2012. The Manufacture category registered the highest absolute increase, $97.0 million to $130.7 million in 2013.

Institutional strengthening to increase financing to MSEs was provided to the NPCB by (i) upgrading their banking system used for processing loans and managing savings accounts; and (ii) creating microfinance units at all branches. These initiatives will continue in 2014. Additionally, the DBJ provided counter-part funding for several projects that enabled capacity building and offered technical assistance to MSEs.

National Insurance Fund

A total of $1 000 million were available for loans under the NIF, of which $935.2 million was disbursed to MSMEs. This represents an increase of 0.5 per cent relative to the funds disbursed in 2012. The number of loans disbursed amounted to 476, and 4 242 jobs were created. Most of the entities that received loans were in the Agriculture, Manufacture, and Services industries.

Micro Investment Development Agency (MIDA)

A total of $166.2 million were disbursed by the MIDA to the micro enterprise entities, an increase of $29.4 million relative to 2012. The sources of funding for disbursements were:

– the Agency's internal portfolio which accounted for $35.7 million relative to $8.2 million in 2012

GOJ/Government of Netherlands (GON) Credit Scheme which contributed $130.5 million compared with $128.6 million in 2012.

Of the total disbursement, females accounted for $114.9 million, an increase of 29.2 per cent compared with 2012. The total number of enterprises funded by the Agency was 3 170 compared with 1 247 enterprises in 2012. This reflected

TABLE 13.5
DISBURSEMENTS BY SELECT RETAIL LENDING AGENCIES, 2012- 2013
($Million)

AGENCIES	2012	2013	% Change 2013/ 2012
Jamaica National Small Business Loan	2 361.6	2 600.0	10.1
EX-IM Bank	946.6	3 953.4	317.6
Access Financial Services	422.0	621.8	47.3
NCB SME	17.5	25.5	45.7
COPE Foundation Limited[a]	39.5	0.0	-100.0
Credit Union	353.2	299.6	n/a
TOTAL (excludes Credit Union)	**3 787.2**	**7 200.7**	**90.1**

a - COPE Foundation was closed in 2012

Source: Compiled by the PIOJ using data received from MIIC and Respective Funding Programmes

TABLE 13.6
JNSBL LOAN DISBURSEMENT, 2010-2013

	2010	2011	2012	2013
		NUMBER OF LOANS DISBURSED		
Bizgrow	34 017	27 921	23 595	24 197
Bizstart	345	n/a	n/a	n/a
Bizboost	32	7	5	12
Agriculture	n/a	n/a	2	5
Education	n/a	n/a	136	482
Motor Vehicle	n/a	n/a	25	23
Personal	n/a	n/a	545	834
Hurricane Loan	7	n/a	125	9
Total	**34 401**	**27 928**	**24 433**	**25 562**
		VALUE OF LOANS DISBURSED ($MILLION)		
Bizgrow	1 835.7	2 092.4	2 227.3	2 399.8
Bizstart	14.7	n/a	n/a	n/a
Bizboost	51.1	4.7	9.2	33.6
Agriculture	n/a	n/a	1.2	1.3
Education	n/a	n/a	15.6	47.3
Motor Vehicle	n/a	n/a	25.8	26.0
Personal	n/a	n/a	67.7	90.7
Hurricane Loan	0.8	n/a	14.9	1.3
Total	**1 902.3**	**2 097.1**	**2 361.6**	**2 600.0**

n/a - not applicable

Source: JNSBL

increases in enterprises operated by both females (up 1 427 to 2 311) and males (up 496 to 859). Most of the loans were disbursed to MSEs in St. Catherine, Kingston & St. Andrew, St. Ann and Manchester, which combined accounted for 66.2 per cent of total loans disbursed (Figure 13A).

Consistent with the upturn in total disbursements, there were increases in loans to three industries — Service, Manufacture and Agriculture. A total of $6.6 million was disbursed to entities in the Manufacture industry, relative to $6.5 million in 2012. Entities engaged in agricultural activities received $16.3 million representing an improvement of $5.2 million compared with 2012. Disbursements to entities in the Service industry amounted to $143.3 million, 20.2 per cent higher than in the previous year.

SELECTED RETAIL LENDING AGENCIES

Other financial institutions that made funds available to MSEs for business development disbursed a total of $7 200.7 million compared with $3 787.2 million in 2012 (Table 13.5). These institutions were as follows:

Jamaica National Small Business Loan (JNSBL) Limited

The total volume of loans disbursed was 25 562 valued at $2 600.0 million compared with 24 433 valued at $2 361.6 million in 2012 (Table 13.6). This increase stemmed from higher take up for all loan categories except for Hurricane[6] loan. The uptick

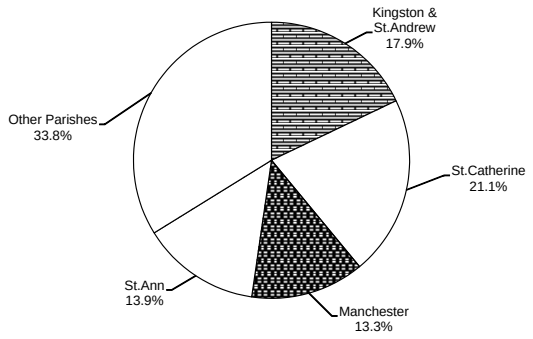

FIGURE 13A: MIDA LOANS DISBURSED BY PARISH

6 The lower uptake for Hurricane loan was as a result of no hurricanes impacting the island in 2013.

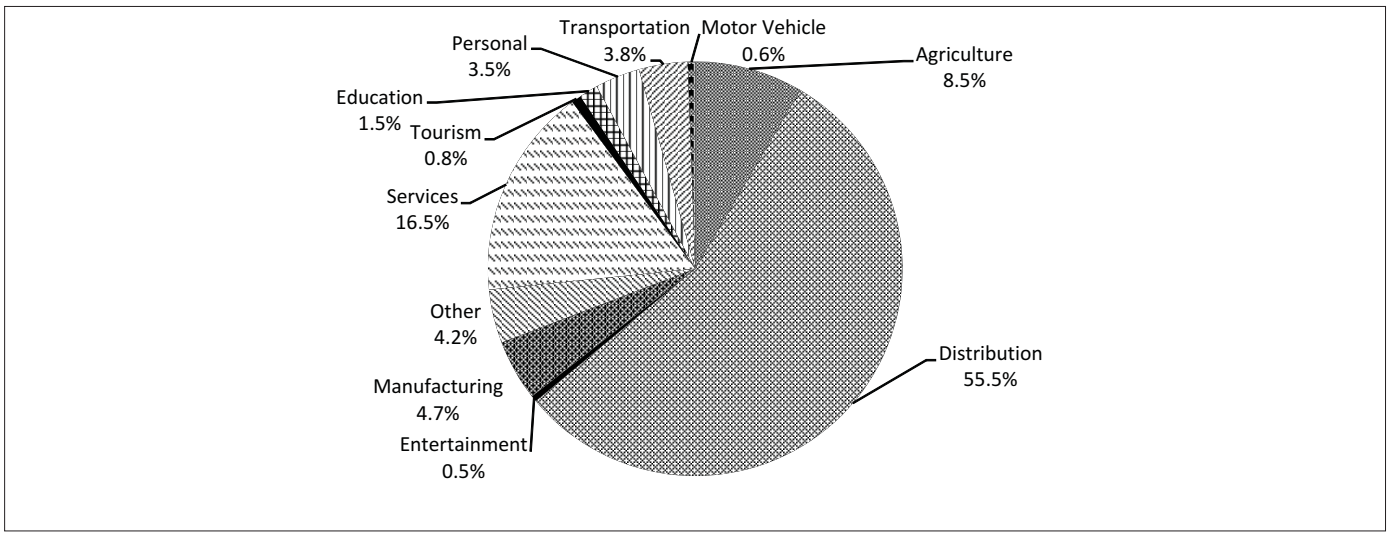

FIGURE 13B: JNSBL DISBURSEMENTS BY TYPE OF ECONOMIC ACTIVITY

in disbursement for Education stemmed from the introduction of a new loan type called 'Back to School'.

The economic activities accounting for the larger shares remained the same in 2013. The Distribution category accounted for 55.5 per cent of total value of disbursements followed by Services (16.5 per cent), Agriculture (8.5 per cent) and Manufacturing (4.7 per cent) {Figure 13B}. All economic industries registered higher volume of loans disbursed, with the exception of Distribution and Entertainment.

At the end of December 2013 the JNSBL loan portfolio was valued at $988.2 million with 14 552 customers compared with $878.5 million and 13 374 customers for 2012. The number of clients in the portfolio that were engaged in the micro category were 14 511 relative to 13 330 in 2012. The majority of the clients in 2013 were females (10 501). The analysis by parish indicated that 67.7 per cent of the total loans in the JNSBL portfolio were concentrated in the parishes of St. Catherine, Kingston & St. Andrew, Clarendon, St. Ann, and Manchester (Figure 13C).

BizGrow[7] – The number of loans disbursed under the BizGrow facility grew by 2.6 per cent to 24 197. There was also an increase in the value of loans totalling $2 399.8 million compared with $2 227.3 million in 2012 (see Table 13.6). At the end of December 2013, the BizGrow portfolio stood at 13 144 loans valued at $825.7 million, compared with 12 524 loans valued at $739.9 million in 2012. This disbursement facilitated the employment of 17 002 persons.

BizBoost [8]– For 2013, disbursements were financed by funds from the National Insurance Fund (NIF) and EX-IM. Disbursements under this facility totalled 12 loans relative to five in 2012, with respective values of $33.6 million and $9.2 million. The BizBoost portfolio at the end of December 2013

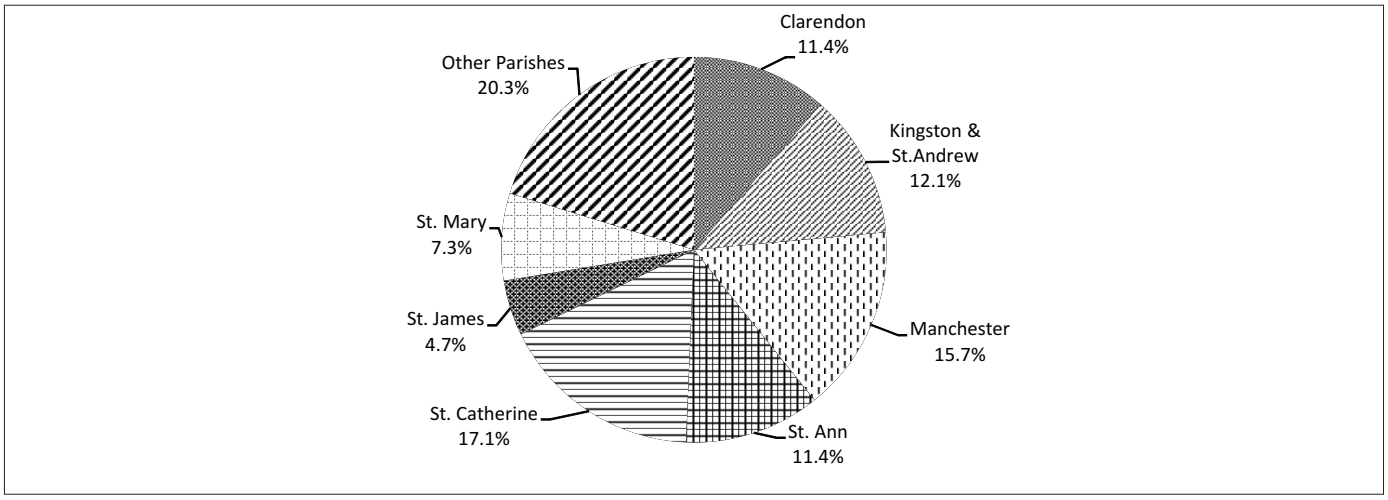

FIGURE 13C: JNSBL LOAN PORTFOLIO BY PARISH

7 BizGrow loans are extended for the expansion of micro businesses.

8 The funds under this facility are made available for the production of craft items, light manufacturing, agriculture, agro processing, tourism, mining, quarrying and services.

was 28 loans valued at $37.1 million relative to 38 loans valued at $33.7 million in 2012. Of the total loan portfolio, 14 loans were financed by funds from the EX-IM while the remaining 14 loans were funded by resources derived from the NIF and DBJ. There was employment of 110 persons associated with the disbursement under the bizboost facility.

National Export-Import Bank (EX-IM Bank)

The EXIM Bank engaged SMEs through the provision of loans particularly for exporting activities. Total disbursements to the SME were valued at $3 953.4 million compared with $946.6 million in 2012. Loans to SMEs accounted for 64.1 per cent of total loans disbursed by the EXIM Bank and were disaggregated as follows: Manufacture (56.1 per cent), Wholesale & Retail Trade/Services (21.7 per cent), Agro-Processing (22.2 per cent).

Access Financial Services

There was an increase of 47.3 per cent to $621.8 million in the value of loans disbursed to the micro and small businesses. A total of 13 796 loans were issued relative to 9 425 in 2012. All loan categories recorded increases disaggregated as follows:

- Trading/Distribution – 8 277 (up 2 522)
- Services – 3 552 (up 1 268)
- Agriculture – 1 606 (up 453)
- Manufacturing – 451 (up 128).

First Union Financial Company Ltd

The total number of loans disbursed for 2013 amounted to 687 relative to 418 in 2012. The number of loans disbursed to micro businesses grew by 286 to 673, whereas loans to small businesses fell from 31 to 14. There were increases in all loans categories except for Accommodation & Entertainment which remained flat. Service and Trading industries recorded the highest increases of 182 to 361 loans and 73 to 280 loans, respectively.

National Commercial Bank Small & Medium Enterprises (NCBSMEs)

Micro and small enterprises benefited from the following:

- SME Conference – this was held in partnership with the inter-American Development Bank/Multilateral Investment Fund under the theme "Facing Challenges…Embracing Opportunities".
- NCB Quick Biz Facility – which was launched in 2012, was subsequently revised in 2013 to enable more customers access to unsecured financing for working capital

Training – in partnership with the HEART Trust/NTA hosted a two-day workshop aimed at providing businesses with tools to enhance productivity.

The number of loans disbursed by the NCBSME was 1 249 relative to 851 in 2012. At the end of December 2013, the stock of loans was $25.5 billion, compared with $17.5 billion at the end of December 2012. Of the total stock of loans, business customers with loan amounts under $50.0 million accounted for $13.2 billion. This represented an increase of $3.2 billion in value of loans to MSEs relative to December 2012.

Sagicor Bank Jamaica Limited (SBJL)

SBJL continued to offer assistance to MSMEs in managing their businesses efficiently through their Business Priority Unit. The services that were offered included: liquidity management; payables and receivables management; and corporate secretarial and registrar services. A total of $39.5 million were disbursed relative to $65.0 million in 2012.

Credit Union

Loan data from 18 of the 38 credit unions revealed that the total number of loans disbursed by credit unions was 646 valued at $299.6 million during 2013. This compares with 971 loans valued at $353.2 million disbursed by 21 of 41 credit unions in 2012.

Other Developments

The MIIC as part of its aim to increase funding to MSMEs, rebranded the Self Start Fund (SSF) to function as the government's microfinance lending agency. Throughout 2013, the main activities were in training staff mainly to improve customer service, and identifying innovative business products for MSMEs interested in providing services under the logistics hub initiative.

The JBDC commenced work on two development projects that will provide assistance to individuals considered vulnerable. One such project is *Steps to Work* which was developed by the Ministry of Labour & Social Security with an aim to wean beneficiaries from PATH. The JBDC will provide 5 000 PATH beneficiaries with business development training and assess their start-up business' eligibility for grants. JBDC started work on the project in November 2013 and has trained 820 individuals in entrepreneurship, product & market analysis; product costing & pricing; and financial projection and management. The training of selected beneficiaries is slated to end in November 2014.

In December 2013, the JBDC conducted pre-feasibility assessments for 10 rural communities as a first step in a Business Development Consultancy project for rural agriculture businesses. This consultancy will continue until February 2015 and will provide 10 rural groups with assistance in preparing businesses plans and business advisory and mentorship services for 12 months.

Under the JMA's MSE Facility which was launched in 2012, a total of 59 MSE businesses became members of the JMA. They benefited from assistance to innovate, grow and compete by means such as seminars, workshops, research, and access to meeting and training rooms.

OUTLOOK

With the economy projected to grow in 2014, it is anticipated that the local demand for goods and services produced by MSEs will increase. Consequently, the Government and relevant agencies will continue to support MSEs through training, the provision of services, creation of an enabling environment, and improved access credit so that MSEs are equipped to meet these demands. Several policy initiatives will be implemented as MSMEs are seen as an integral part of achieving growth in the economy. The training of entrepreneurs will be enhanced through the development of workforce colleges that will facilitate internships for trainees within technical and vocational education institutions. These workforce colleges will require competence during internship before certification can be granted, as a means of improving the quality of the labour force operating within the MSE sector.

The DBJ has entered into agreements with several entities that will provide technical assistance to MSEs. A key project is the SME Capacity Building programme, a part of World Bank/GOJ's Growth & Competitiveness Project. The aim of this project is to upgrade the capabilities of existing SMEs in specific areas over a five-year period. This should result in increased production by SMEs and a reduction in the imports of value-added products. Particularly for micro entrepreneurs, a curriculum will be developed to enable training on the proper management of money. It is expected to impact 500 individuals and assist in their preparation for unexpected emergencies without incurring debt. Among the plans for increased financing to SMEs that will start in 2014 are:

- ***Voucher for Technical Assistance*** – accredited financial institutions will refer SMEs who have not qualified for loan to business development offices to build their capacity and improve the chances of accessing credit
- ***SME Capacity Building Model for Venture Capital Readiness*** – 30 SMEs will be equipped with skills to identify venture opportunities and prepare proposal for funding
- ***Financial information & Matchmaking*** – this will provide entrepreneurs with viable business ideas, an avenue to present their ideas to a panel of financiers ■

CHAPTER 14

CONSTRUCTION

INTRODUCTION

Real value added for the Construction[1] industry grew by 1.8 per cent relative to 2012 (Figure 14A). The growth recorded for the industry emanated from:

— the upturn in the Building Construction category which benefited from increases in residential activities

— growth in the Other Construction category which was a result of higher levels of expenditure for the Civil Engineering subcategory which was linked to an increase in the level of activities on road construction projects associated with the North-South Leg of Highway 2000 – Caymanas to Linstead, Linstead to Moneague and Moneague to Ocho Rios segments

— an increase in the Building Installation[2] category which was due to activities associated with the other two categories.

The impact of the higher growth for the industry was reflected in the performance of some inputs used in the production process, including labour and the supply of cement. The average number of persons employed in the industry increased by 2.3 per cent compared with 2012.The production of cement increased by 8.5 per cent to 824.9 kilo tonnes, however, there was a 45.8 per cent decline in cement exports to 118.6 kilo tonnes relative to 2012.

The supply[3] of cement to the domestic market grew by 15.7 per cent to 808.1 kilo tonnes. This increase in cement supply represented the first annual increase since 2008.

POLICY AND PROGRAMMES

For 2013, the primary focus of the Ministry of Transport Works and Housing (MTWH) was on encouraging land titling and providing low income housing solutions. The objectives for development of the housing sector, as outlined in the National Housing Policy and Implementation Plan, are achieved mainly by the activities undertaken by the National Housing Trust (NHT) and the Housing Agency of Jamaica (HAJ).

Other related policies and programmes which guided activities through the year were:

The National Squatter Management Policy and Implementation Plan (NSMP) — Preliminary preparation for the NSMP began in 2013 with the procurement of a consultant to undertake comprehensive secondary research.

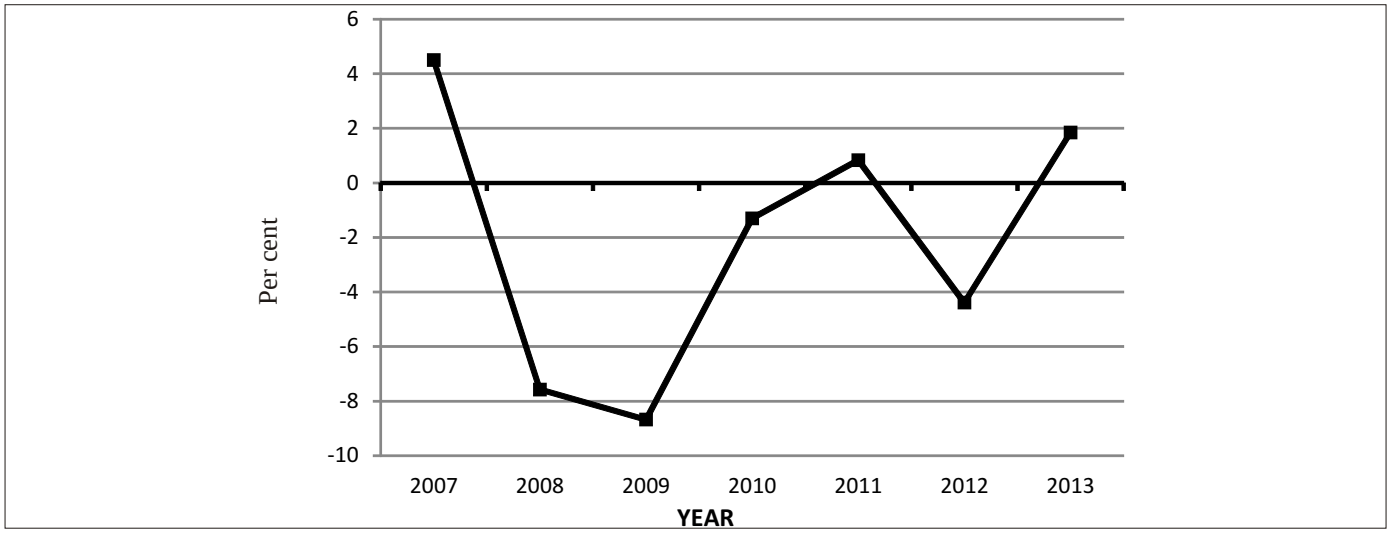

FIGURE 14A: REAL VALUE ADDED GROWTH RATES FOR THE CONSTRUCTUION INDUSTRY, 2007-2013

1 Total Construction consists of Building Construction, Other Construction and Building Installation. Building Construction and Other Construction accounted for the majority of Total Construction.

2 Data for electrical inspections, a key indicator for the Building Installation category, were not available for the period under review.

3 Total Supply = Total Production – Exports + Imports

The NSMP seeks to address the continued growth in the rate and scale of informal settlements in Jamaica. It also aims to examine the social, environmental, health and economic impacts of squatting and recommend solutions. Activities under the Jamaica Titling Programme were implemented in 2013 to prevent, control, contain or direct informal settlements and included:

— *Jubilee Housing Project* — This initiative, which was announced on October 1, 2012 as part of the celebration for World HABITAT Day, targeted one beneficiary from each of 50 schemes established by the MTWH. The programme provided qualified beneficiaries with the opportunity to obtain land titles by writing off existing mortgage balances. In July 2013, a total of 47 mortgagees benefited from the initiative and were awarded their titles.

— *Operation Pride/Brownfield'* [4]*Development Title Delivery Programme* — As at December 31, 2013, a total of 1 100 splinter titles[5] were transferred to beneficiaries in each of 32 selected brownfield projects under the Jamaica Titling Programme. The initial target of transferring 5 000 titles for FY 2013/14 was revised to 3 536 due to factors such as lack of community sensitization, and the inability or reluctance of beneficiaries to make payments that would facilitate the transfer process. The amount required for the title transfer was $75 000 per beneficiary.

Housing Public-Private Partnership Policy[6] **(Review)** (**HPPP**) — A committee of internal stakeholders was established in November 2013 to review this policy which was tabled in Parliament in May 2008. For the review, the committee focused on addressing issues associated with unsolicited proposals, identifying factors affecting joint venture programmes and appropriate strategies to alleviate them.

Low Income Housing Programme —The MTWH continued the implementation of plans aimed at alleviating the poor living conditions of vulnerable households located in inner city and informal communities. These primary programmes included:

— Government of Jamaica (GOJ)/Food for the Poor (FFP)/PetroCaribe Housing Project (under the Jamaica Emergency Employment Programme – JEEP)

— GOJ/FFP/NHT – 600 Concrete Houses Project

— Jamaica Economic Housing Project

— ***GOJ/FFP/PetroCaribe Housing Project*** — An agreement to construct 100 two-bedroom wooden units per month for a period of five years was finalized with the GOJ/Housing Agency of Jamaica and the FFP in August 21, 2012. The passage of Hurricane Sandy in October 2012 affected an estimated 500 houses in Jamaica and resulted in a re-prioritization of the programme's objective. Funds were reallocated to the Hurricane Sandy Emergency Relief Programme where priority was given to the most affected parishes of St. Mary, Portland and St. Thomas.

— Since the inception of the programme, 1 165 units were completed of which 1 007 were completed in the first year and 158 wooden units in the second year. Of the total, an estimated 433 units were constructed for victims of Hurricane Sandy and the remaining 732 units were built under the initial agreement. The GOJ/FFP/PetroCaribe Housing Project is funded through a $500 Million Grant from the PetroCaribe Development Fund.

— ***GOJ/FFP/NHT – 600 Concrete Houses Project (under the JEEP)*** — This is a five-year programme aimed at alleviating the need for housing by individuals with earnings of between $7 000 – $10 000 per week. The agreement mandates the NHT to construct 600 concrete units each year at a cost of US$5.7 million, using the FFP's wooden unit as a model.

— The construction of 30 units was completed at Meylersfield, Westmoreland, by August 30, 2013. Another 150 units were built in Hampden, Trelawny, 12 of which were constructed for NHT beneficiaries of Build-on-Own-Land loans. Disbursements for these projects were estimated at $38.5 million and $204.2 million for Meylersfield, Westmoreland; and Hampden, Trelawny, respectively.

— ***Jamaica Economic Housing Project*** — A 20-year loan from the Export Import Bank of China was approved by Cabinet in 2009 for a housing development project. The project was implemented under three contracts, two of which were completed and resulted in the construction of 1 735 units in Belle Aire and Edgecombe in St. Ann since the project's inception.

Other initiatives for 2013 included the Zinc Fence Removal (ZFR) project which commenced in February, 2013. The ZFR project was geared towards raising the living conditions of inner-city communities, as well as beautifying and enhancing these communities, while providing employment opportunities. The communities which were targeted under the initiative included: Payne Land, Trench Town, Bedward Gardens, Whitfield Town, Greenwich Town, Duhaney Park, Admiral Town and Wildman Street. Members of these communities were encouraged to provide their services as labourers, masons, steel fixers, carpenters and foremen.

The Mortgage Bank Act was amended on May 1, 2013 to increase the affordability of housing by reducing the burden of a high down payment from the 10–15 per cent band to three per cent. The amendment also increased the aggregate per cent of the appraised value of the property on which mortgage indemnity insurance can be granted, from 90 per cent to 97 per cent.

In November 2013, the MTWH updated the Construction Industry Policy which provides the framework for supporting and encouraging development and growth in the industry. The document was issued later to ministries, agencies and professional bodies for final comments which

4 Brownfield projects refer to developments or exploration projects in the vicinity of an existing or historic operation.

5 Splinter Titles are issued for individual lots in schemes.

6 The Housing Public-Private Partnership Policy was formerly known as the Joint Venture Policy.

TABLE 14.1
MAJOR PERFORMANCE INDICATORS OF THE CONSTRUCTION INDUSTRY, 2009 - 2013

	2009	2010	2011	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
Total Housing Starts	2 107.0	2 674.0	6 405.0	1 790.0	2 896.0	-72.1	61.8
Number of Housing Starts by NHT	1 688.0	1 278.0	1 466.0	1 790.0	1 689.0	22.1	-5.6
Total Housing Completions	2 433.0	2 999.0	3 644.0	4 334.0	5 560.0	18.9	28.3
Number of Housing Completions by NHT	1 821.0	1 452.0	1 618.0	2 676.0	1 621.0	65.4	-39.4
Total Number of Mortgages	7 955.0	8 292.0	14 090.0	11 684.0	17 308.0	-17.1	48.1
Number of Mortages by NHT	5 918.0	6 806.0	7 425.0	7 205.0	7 916.0	-3.0	9.9
Total Value of Mortgages ($m)	23 185.8	24 673.8	27 955.7	28 698.9	37 688.3	2.7	31.3
Value of Mortgages by NHT ($m)	12 275.4	15 714.6	20 671.8	19 387.3	21 697.0	-6.2	11.9
Commercial Bank Loans & Advances ($m)	19 909.4	21 962.6	18 487.9	21 115.4	23 217.9	14.2	10.0
Cement Production ('000 Tonnes)	736.9	723.5	766.3	760.3	824.9	-0.8	8.5
Cement Imports ('000 Tonnes)	147.2	197.4	166.4	157.0	101.8	-5.6	-35.2
Silica Sand Production ('000 tonnes)	6.8	13.0	14.0	13.9	15.8	-0.7	13.7
Limestone Production ('000 tonnes)	1 913.8	1 956.1	2 451.0	2 232.6	1 949.4	-8.9	-12.7
Sand and Gravel Production ('000 tonnes)	2 600.0	2 750.0	2 475.2	2 599.0	1 902.4	5.0	-26.8
Marl & Fill Production ('000 tonnes)	2 055.0	2 155.0	1 140.2	1 186.0	1 197.6	4.0	1.0
Paint Production ('000 ltrs)	10 767.0	9 249.0	9 765.0	9 479.0	9 401.0	-2.9	-0.8
Employment (annual average '000 persons)	96.0	89.6	88.2	81.1	83.0	-8.0	2.3

r - revised
p - preliminary

Source: Compiled by the Planning Institute of Jamaica

were incorporated before submission for its tabling in Parliament as a White Paper. The review was conducted against the background of aligning the policy with the objectives of Vision 2030 Jamaica – National Development Plan.

PERFORMANCE

The industry grew by 1.8 per cent and was driven primarily by the Other Construction category which was influenced by the increased road infrastructure activities. The Building Construction category also grew and reflected primarily increased residential construction during 2013.

RESIDENTIAL CONSTRUCTION[7]

Housing Starts[8]: Housing Starts during 2013 totalled 2 896 compared with 1 790 starts in 2012 (Table 14.1). This increase was primarily associated with a rise in the number of starts by the Housing Agency of Jamaica (HAJ) and an increase in starts by Private Developers who are provided interim financed loans by the NHT. Starts by the HAJ[9], which recorded no starts in 2012, amounted to 937 units which represented 32.4 per cent of the total housing starts for the year. The number of housing starts by Private Developers totalled 270 units compared with no starts in 2012.

Housing Starts by the **National Housing Trust (NHT)** totalled 1 689 solutions,[10] representing a decline of 5.6 per cent relative to 2012 (see Table 14.1). Construction activities by the NHT are disaggregated as follows:

— Build-on-Own Land which amounted to 324 units, a decrease of 8.2 per cent compared with 2012

— Construction of 872 units, representing an increase of 17.7 per cent

— Home Owners Construction, down 10.8 per cent to 363 units in 2013

— Construction of 130 units in Hampden, Trelawny under the First Step Housing Programme.

Housing Completions[11]: The total number of Housing Completions increased to 5 560 units compared with 4 334 during 2012. This increase was spurred mainly from higher completions by the HAJ of 1928 relative to 970 units in 2012. The number of units completed by Private Developers funded by the NHT was 2011 compared with 733 units in 2012. However, housing completions by the NHT fell by 39.4 per cent to 1621 units.

NON-RESIDENTIAL ACTIVITIES

Capital expenditure on construction by selected institutions recorded an increase of 22.0 per cent to $43 391.6 million in 2013. The increase in the capital expenditure for 2013 was driven primarily by activities from the:

7 Data on housing starts and completions represent a portion of the actual activities for Residential Construction.
8 Housing Starts refer to the commencement of infrastructure/foundation work on a housing solution.
9 This figure for HAJ represent housing data for the period January–September 2013.
10 A housing solution refers to a service lot or a housing unit. A service lot is a plot of land allocated for a housing unit and a unit refers to the physical construction of a dwelling.
11 Housing completions refer to the completion of basic infrastructure such as water, light and drainage on a housing solution.

— National Road Operating & Construction Company Limited (NROCC) which accounted for the largest increase in capital expenditure, moving to $14 408.7 million relative to $5 062.8 million in 2012 (Table 14.2). This increase was as a result of road construction activities associated with the North-South leg of Highway 2000.

— Jamaica Social Investment Fund (JSIF) which disbursed $1 401.8 million, an increase of $ 651.5 million relative to 2012. The capital expenditure recorded was primarily for community development such as: the construction of homes for children and the elderly; community centres; water sanitation and stormwater roads.

— National Water Commission (NWC) which disbursed $10 905.3 million, representing a 86.2 per cent increase relative to 2012, continued rehabilitation work on various water supply programmes. The main programmes were the Jamaica Water Supply Improvement Project, which recorded $4 596.8 million in expenditure, and the Kingston Metropolitan Area (K-Factor) project which disbursed $826.0 million.

— Jamaica Public Service (JPS) which registered a 12.0 per cent increase in capital expenditure to $6 207.6 million. The funds expended were used for the general upgrade of plants and sub-stations; and for increasing generation capacity.

A further increase in the performance of the Non-Residential component of the Other Construction category was stymied by declines in capital expenditure from:

— Port Authority of Jamaica (PAJ) which disbursed $82.1 million representing a fall of $387.4 million.

TABLE 14.2
CAPITAL EXPENDITURE BY INSTITUTIONS
$'MILLION

Executing Agency	2009	2010	2011	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012	
National Works Agency (NWA)	241.1	5 913.7	15 378.6	15 053.1	7 652.8	-2.1	-49.2	Expenditure on Road Construction which include the Northern Jamaica Development Project and the Transport Infrastructure Rehabilitation Programme.
National Road Operating & Construction Company Limited (NROCC) b	3 191.9	779.0	3 288.3	5 062.8	14 408.7	54.0	184.6	Expenditure primarily on the North-South Leg of Highway 2000 - Caymanas to Linstead, Moneague to Ocho Rios and Linstead to Moneague segments
National Water Commission (NWC)	1 521.7	5 272.4	4 409.9	5 856.9	10 905.3	32.8	86.2	Continued rehabilitation work on various Water Supply Programmes. The main projects were the Jamaica Water Supply Improvement Project, the implementation of water infrastructure and the Downtown Kingston Sewerage - Darling Street project .
Jamaica Public Service Company Limited (JPSCo)	1 640.3	3 853.5	4 718.9	5 541.8	6 207.6	17.4	12.0	Funds were used to upgrade general plant, sub-station and generation capacity.
Telecommunication Sub - Sector	4 625.4	5 234.6	6 258.7	2 482.6	2 387.8	-60.3	-3.8	Expenditure on mobile communications expansion of the GSM network, as well as cost relating to Building Services, tools and testing equipment.
Jamaica Social Investment Fund (JSIF)	570.8	516.5	930.4	750.3	1 401.8	-19.4	86.8	Construction and refurbishing of Schools, Community Centres, Homes for Elderly/Children, Stormwater Roads and Water Sanitation
Port Authority of Jamaica (PAJ)	4 387.6	5 459.6	1 575.6	469.5	82.1	-70.2	-82.5	Funds were used mainly on infrastructure development and the construction of Docks and Berths

CONT'D ➔

TABLE 14.2 . . . continued

Urban Development Corporation Limited (UDC)	1 839.9	2 611.1	1 570.6	372.3	345.5	-76.3	-7.2	The primary activties being financed included Simon Bolivar Cultural Centre, Kingston Craft Market Renovation, Falmouth Town Centre (Resort Upgrading) and Half Moon Bay Sewerage Lift Station Upgrade.

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: $100.76) for 2013, .
r - revised

Source : Compiled by the Planning Institute of Jamaica from information received from various institutions

— National Works Agency (NWA) accounted for $7 652.8 which was $7 400.3 less than the sum disbursed in 2012.

— Urban Development Corporation Limited (UDC), down 7.2 per cent to $345.5 million during the year.

— Telecommunications registered a decline of 3.8 per cent to $ 2 387.8 million.

EMPLOYMENT

The average employment grew by 2.3 per cent to 83 025 persons in 2013. The higher average employment in the industry represented increases in both the average number of males and females employed. The average number of males working in the industry grew by 2.1 per cent to 80 150, while the average number of females increased by 11.7 per cent to 2 875. The industry accounted for 7.5 per cent of the overall average number of employed persons compared with 7.3 per cent in 2012.

CONSTRUCTION INPUTS

Higher output levels relative to 2012 were recorded for some inputs used in the industry including:

— Silica Sand, used in the production of thin set, recorded a 13.7 per cent increase in production to 15.8 kilo tonnes

— Cement supply increased to 808.1 kilo tonnes, up 15.7 per cent. Which was due to the combined effect of higher cement production and net import of cement

— Pozzolan grew by 4.7 per cent to 112.3 kilo tonnes

— Marl & Fill production moved to 1 197.6 kilo tonnes, an increase of 1.0 per cent.

However, Limestone[12] production fell to 1 949.4 kilo tonnes from 2 232.6 kilo tonnes in 2012; Sand & Gravel output declined by 26.8 per cent to 1 902.4 kilo tonnes; and Paint Production declined to 9 401 kilo litres, down 0.8 per cent (see Table 14.1).

FINANCING TO THE INDUSTRY

Mortgage Financing

The total value of mortgages amounted to $37.7 billion, an increase of $9.0 billion relative to 2012 (Table 14.3). This was influenced by the growth in the value of mortgages provided by the NHT which totalled $21.7 billion, an increase of 11.9 per cent relative to 2012. Accompanying this increase was the rise in the total number of mortgages which moved from 11 684 in 2012 to 17 308. Of the total mortgages provided, the NHT accounted for 7 916 which represented an increase of 9.9 per cent relative to 2012 and accounted for 45.7 per cent of total mortgages in 2013.

TABLE 14.3
MORTGAGES BY MAJOR AGENCIES, 2009-2013
$ Million

	Jan-Dec 2009		Jan-Dec 2010		Jan-Dec 2011[r]		Jan-Dec 2012[r]		Jan-Dec 2013[p]	
Entities	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
NHT	5 918	12 275.4	6 806	15 714.6	7 425	20 671.8	7 205	19 387.3	7 916	21 697.3
Building Societies[a]	2 037	10 849.4	1 479	8 909.9	918	5 171.4	1 281	7 399.4	1 649	12 264.9
Life Insurance	-	61.0	7	49.3	22	144.6	43	254.5	51	450.8
Credit Unions	-	0.0	-	0.0	5 725	1 967.9	3 155	1 656.6	7 692	3 275.3
Total	7 955	23 185.8	8 292	24 673.7	14 090	27 955.7	11 684	28 698.9	17 308	37 688.3

r - revised
p - preliminary
a - values for 2011 includes amount provided by only two of the mortgage institutions

Source: Compiled by the Planning Institute of Jamaica

12 Limestone is also widely used in the production process of alumina.

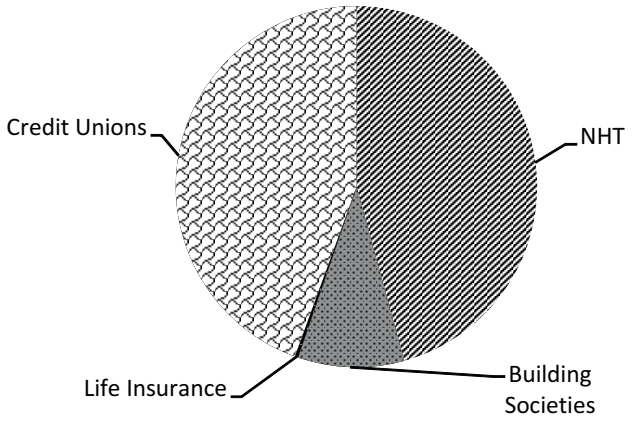

FIGURE 14B: MORTGAGE DISBURSEMENT BY FINANCIAL INSTITUTIONS

The volume and value of mortgages disbursed by the Building Societies stood at 1 649 (up 28.7 per cent) and $12 264.9 million (up 65.8 per cent), respectively. Disbursements from Building Societies accounted for 32.5 per cent of total value of the mortgages (Figure 14B).

Total disbursements by the **Jamaica Mortgage Bank (JMB)** to the developers in the industry stood at $546.8 million compared with $536.7 million in 2012. Projects financed during 2013 included:

- Parry Court - $0.5 million
- Meadowbridge - $17.5 million
- Kings Manor - $35.7 million
- City View - $14.3 million
- Little Bay Country Club - $115.0 million
- Huddersfield - $28.2 million.

Other Financing

Commercial Bank Loans & Advances to the industry[13] as at the end of 2013 was $23.2 billion compared with $21.1 billion as at the end of 2012. Of the total, $21.8 billion was for the category Construction, representing an increase of 3.3 per cent relative to 2012. Land Development and Land Acquisition accounted for the remaining $1.4 billion.

At the end of 2013, loans from Institutions Licensed under the Financial Institutions Act to the industry totalled $0.6 billion compared with $0.7 billion at the end of 2012.

OUTLOOK

Real value added for the Construction industry is projected to grow during 2014. This outcome will reflect an increase in Civil Engineering activities in the Other Construction category, associated with the continuation of work on the North-South Link of Highway 2000.

Residential activities in the Building Construction category are expected to increase in support of housing development programmes such as the Jamaica Economic Housing Project. The implementation of contracts three and four in Belle Aire, St. Ann; and Luana Gardens, St. Elizabeth are slated to be completed by October 2014 and April 2015, respectively.

Ongoing construction of the 161-room business hotel and six-block apartment complex by the Marriot Group, combined with plans to construct phase two of the Royalton Memories White Sands Resort, is expected to boost the performance of the Non-Residential component. These projects will also generate an improvement in the number of employed persons in the industry.■

13 Commercial Banks make available loans to the industry under these three categories: Construction; Land Development; and Land Acquisitions.

CHAPTER 15

ENERGY, ELECTRICITY & WATER

INTRODUCTION

Real value added for the Electricity & Water Supply Industry declined by 2.0 per cent relative to 2012, marking two consecutive years of decline (Figure 15A). The decrease in real value added reflected contractions in electricity consumption[1] and water production. The fall-off in the former emanated mainly from reduced demand, while the downturn in the latter may be explained by a combination of factors, including high levels of leakages and drought conditions.

Total electricity generation amounted to 4 141.6 gigawatt hours (GWh)[2] compared with 4 136.0 GWh in 2012. The higher output reflected a 16.7 per cent increase to 1 799.5 GWh in generation from non-Jamaica Public Service (JPS) sources. This represented 43.4 per cent of total generation, a 6.2 percentage point expansion relative to the 37.2 per cent share attained in 2012. Production from JPS sources fell by 9.7 per cent to 2 342.2 GWh, and represented the fourth consecutive year of decline. There was a 0.8 per cent drop in heat rate[3] to 9 884.0 kilojoules per kilowatt hour (kJ/kWh), the third consecutive year of improvement in generating efficiency. Total electricity sales was 3 025.8 GWh relative to 3 090.2 GWh in 2012. Revenue, however, expanded to $110.1 billion compared with $101.4 billion the previous year.

The amount of water produced by the National Water Commission contracted by 1.5 per cent to approximately 298 029.2 megalitres. An estimated 92 286.2 megalitres of this production (31.0 per cent) was consumed compared with 94 413.7 megalitres (31.0 per cent) of the 302 423.8 megalitres produced in 2012. Water connections increased by 1.2 per cent to 459 563. The Commission's billed revenue rose by 1.6 per cent to $22 326.5 million.

World crude oil supply reached 91.6 million barrels per day (mbd) relative to 91.0 mbd in 2012. The growth in supplies emanated from increased output from non-OPEC countries, up 2.4 per cent to 54.7 mbd. Similarly, world oil demand expanded by 1.3 per cent to 91.2 mbd, reflecting growth in demand of 2.7 per cent to 45.2 mbd in Non-Organization for Economic Corporation and Development (Non-OECD) countries and 0.2 per cent to 46.0 mbd in OECD countries. The spot peak price of crude oil on the international market averaged US$104.09 per barrel compared with US$105.01 per barrel in 2012. The local average billing prices for most petroleum products surveyed in 2013 were higher than 2012.

ENERGY POLICIES and PROGRAMMES

Jamaica's energy sector over the years faced a number of challenges. The high energy cost has been mooted as one of the

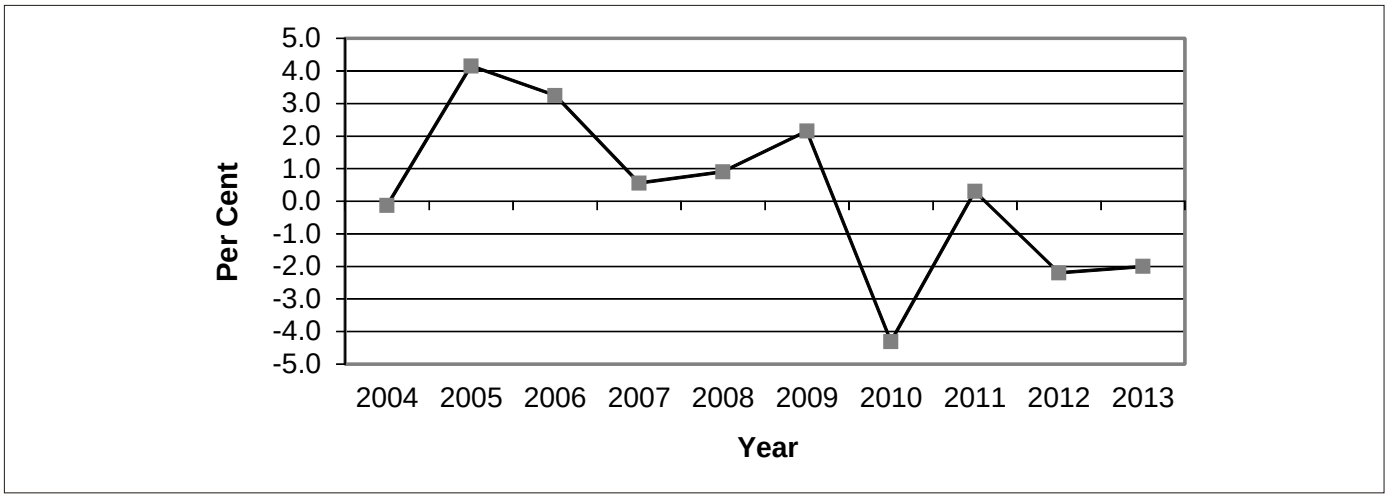

FIGURE15A: REAL VALUE ADDED CHANGES FOR ELECTRICITY & WATER SUPPLY INDUSTRY, 2004-2013

1 Based on the System of National Accounting 1993, electricity consumption is being used in GDP calculation for the electricity component of the Industry.

2 1 Gigawatt hour = 1 million kilowatt hours

3 Heat rate measures the efficiency of converting fuel to electricity. An increase in value implies deterioration in the efficiency of conversion

chief impediments to economic growth and job creation. In recognition of this, among other things, the government, through the Ministry of Science, Technology & Mining (MSTEM), in 2013 continued its search for solutions to address the high energy cost. The National Energy Policy (NEP) and its attendant sub-policies support the implementation of *Vision 2030 Jamaica – National Development Plan (NDP)*, and continued to guide the activities of the sector. Consistent with the NEP's vision of creating "a modern, efficient, diversified and environmentally sustainable energy sector…", the policy outcomes articulate the provision of more affordable energy supplies; an improved competitive base; as well as sustainable growth and development for industries. Activities in the sector during the year continued to focus primarily on:

— modernization of the energy infrastructure

— diversifying the fuel sources

— improving energy efficiency and conservation (EEC)

— enhancing energy security

— promoting and facilitating competition in the electricity sub-industry

— developing renewable energy (RE) sub-industry

Efforts in these areas continued in an atmosphere of participation and consensus building among stakeholders and this was facilitated mainly through the work of the Jamaica Energy Council (JEC). The four sub-committees, namely the: EEC, RE, Public Engagement, and Petroleum Advisory continued to provide support during the year. The JEC is a consultative body made up of key energy sector stakeholders and was set up to address the lack of consensus, broaden participation and expedite decisions associated with the implementation of the NEP, among other objectives.

Modernization of the Energy Infrastructure / Diversifying Fuel Source

The existence of a modern energy infrastructure is critical to reducing the current high cost of electricity. Consequently, the injection of new generating capacity was foremost among initiatives undertaken in 2013. Plans continued toward diversifying the energy supply to include natural gas, through the proposed commissioning of an initially 360 MW (subsequently adjusted to 381 MW) Combined Cycle Plant. Bids were posted and Energy World International (EWI) eventually became the successful bidder[4]. A Power Purchase Agreement (PPA) between EWI and JPS was subsequently executed and discussions surrounding the issuing of a Licence by the Minister were ongoing. The 20-year PPA will become effective on the issuance of the licence, paving the way for the start-up of this base load capacity project. Under the PPA, EWI will design, finance, construct, operate and maintain the power generation facility which will have a net capacity of 381 MW.

Improvement in Energy Efficiency & Conservation (EEC)

The implementation of activities under the EEC Programme was undertaken in the public sector through partnership with the Inter-American Development Bank (IDB). The programme, which commenced in 2012, is to be executed over a three-year period at a cost of US$20.0 million. An initial allocation of $310.0 million was budgeted in Fiscal Year 2013/2014 to support the project. Expenditure on the programme as at the end of December 2013 was $48.6 million. Several EEC retrofitting opportunities were identified at public institutions, including air conditioning, lighting and building envelope insulations. Among the specific activities pursued were the installations of:

— over 15 000 square feet (sq.ft.) of Solar Control Films at 19 public sector locations

— over 161 700 sq. ft. of Cool Roof Solution at 11 public facilities

— energy efficient air conditioning solutions at four facilities.

At two of the public buildings (Jamaica House and the National Housing Trust) where both cool roof solution and solar control films were installed, temperature reductions of 20–30 degrees centigrade were reported. This has led to a reduction in the amount of heat entering the building and consequently reduced electricity consumption for air conditioning. For the period July 2012 – July 2013, electricity consumption at the NHT and Jamaica House showed reductions of 61 719 kWh and 11 917 kWh, respectively. In addition, a sensitization workshop was conducted which aimed to create awareness of EEC and influence behaviour.

The Petroleum Corporation of Jamaica (PCJ) also undertook energy efficiency activities. Energy audits were conducted for the National Library of Jamaica and the Jamaica Library Services and the air conditioning systems were upgraded at the Spanish Town and May Pen Hospitals. Initial steps were taken for implementing efficient lighting projects at Ardenne, Norman Manley, Old Harbour and Glenmuir High Schools; as well as the Spanish Town and May Pen Hospitals. In addition, the procurement phase of a Solar Photovoltaic (PV) Project was also initiated and will involve the installation of rooftop solar PV systems at 15 schools and three public sector agencies. Collectively, these systems will deliver 232 kW peak power which should reduce the energy bills at the benefiting institutions and contribute to the goal of reducing Jamaica's dependence on non-renewable energy sources. The project is expected to move to the installation phase in the 2014/15 fiscal year.

Energy Security and Efficiency Enhancement

The ***Energy Security and Efficiency Enhancement Project (ESEEP)*** is one of the key initiatives to ensure the implementation of the NEP, and 2013 marked the second year of the loan agreement with the World Bank. An initial budgetary support of $269.2 million was programmed in FY 2013/2014 for the project. The expenditure at the end of December 2013 of $225.4 million was used to advance work on a number of initiatives under its three components:

— Component 1: Strengthening the regulatory and institutional framework to improve energy sector's performance and increase private investment and support the transition to cleaner fuels

4 EWI (the second ranked bidder) was chosen after the first ranked bidder, Azurest-Cambridge failed to post security bid bond by the final date of October 3, 2013.

such as Liquefied Natural Gas (LNG). Work under this component included the completion of: i) the Grid Assessment and Analysis for the increased penetration of renewable energy into the electricity grid; ii) the development of the Electric Power Sector Policy and a draft Electricity Act to modernize the current Electric Lighting Act (1890); and iii) the development of a draft legal and regulatory framework for the gas sector (draft).

— Component 2: Developing Jamaica's Energy Efficiency (EE) and RE potential through private sector investment and consumer education. Completed activities under this component included: i) the acquisition of Modern Sector Planning Instruments and training of the Office of Utilities Regulation's staff; ii) disbursement of 10 loans totalling US$959 498.49 through the Development Bank of Jamaica – Line of Credit facility; iii) signing of contracts for the Hydro Power Feasibility Studies of five selected sites in Jamaica, implementation of National Energy Policy / Communication and Public Education Programme, Architectural Consultancy for Building Modification Works; and iv) the procurement of a Technical Management Specialist to oversee the Bureau of Standards component under the Project.

— Component 3: Project Management, Monitoring and Evaluation, under this component the Energy Communication and Public Education Strategy (draft) to drive the communication programme as well as the various project reports were completed.

Work continued under the UNDP-supported ***Capacity Development for Energy Efficiency and Security in Jamaica Project***. The project, which is focused on energy efficiency and security, is envisaged to contribute to reducing Jamaica's carbon footprint thereby moving towards green development as agreed under international conventions. The strategy will support the government (through the MSTEM) under the three components. The achievements in 2013 under each included the completion of work under Component I – Capacity Development in the Public Sector. Under Component II – Technical Assistance for Small Scale Renewable Energy, the "Wind Power for Domestic/Community Feasibility Study and Regulatory Review", was completed and accomplished the following:

— the assessment of the potential feasibility and viability to produce and distribute wind energy. This information can be used to guide the private sector and community groups in establishing domestic wind sites and in expanding the use of alternative energy across the island

— a review of the regulatory framework governing energy production and distribution

Three stakeholders' fora under Component III – Establishment of a Public-Private Dialogue Forum – were completed.

Promotion and Facilitation of Competition

This was initially facilitated through liberalisation of the national grid and was to be further enhanced and pursued through the introduction of **Net Billing** and **Power Wheeling**[5]. At the end of December, 164 Net Billing applications were received, 150 licences granted, 34 contracts signed, and 12 persons connected to the grid. The processes are on-going as the Office of Utilities Regulation (OUR) and other stakeholders continue to work towards expediting the process. The Wheeling Framework Determination for **Power Wheeling** was issued in July 2013 and documentation placed on the Office of Utility Regulation's (OUR) website. The receipt of application for Power Wheeling, which should have commenced in August 2013, was stalled as JPS appealed to the Electricity Appeal Tribunal (EAT). The OUR halted the decisions in its Determination, pending the hearing of the application.

Renewable Energy Development

Following the full liberalization of the renewable energy market in 2012, the government in 2013, consistent with its policy objectives, continued its drive to reduce the country's dependence on imported fossil fuels by infusing renewable sources into the country's energy mix. In 2013, an estimated 8.0 per cent of the energy supply mix was attributable to RE approximately the same as in 2012. To further advance the amount of renewables in the energy mix, a request for proposal (RFP) for the provision of 115 MW of renewable energy was issued in November 2012. Three bidders were selected for energy only projects totalling 78MW:

— Blue Mountain Renewables LLC, to supply 34MW of capacity from wind power at Munro, St. Elizabeth

— Wigton Windfarm Limited, to supply 24MW of capacity from wind power at Rose Hill, Manchester

— WRB Enterprises Inc., to supply 20MW of capacity from Solar PV from facilities in Content Village, Clarendon.

All three entities met the bid security deadline of October 15, 2013, paving the way to commence the negotiation of Power Purchase Agreements (PPAs).

These activities dovetailed with on-going work by the Petroleum Corporation of Jamaica (PCJ), consistent with its mandate to manage the country's energy needs in a manner that supports the overall strategy for national development. The Corporation focused on four main areas: a) promoting energy efficiency; b) increasing the use of renewable energy sources; c) facilitating the production of biofuels; and d) driving oil and gas exploration. The organization spearheaded several initiatives in the following areas:

— ***Hydro*** – In March 2013, a $109 million contract was signed with the Italian engineering firm SP Studio Pietrangeli, to assess the hydro power potential of five local rivers. The contract was financed under the Energy Security and Efficiency Enhancement Project (ESEEP). Reports from prefeasibility studies submitted in November 2013 indicated that four

5 Power Wheeling is a system which allows a self-generator to generate at one location for use at another for its own benefit, while net billing is an arrangement whereby small producers of electricity who are also JPSCo customers will be remunerated for electricity supplied to the grid.

of the five – the Rio Cobre River in St. Catherine, the Negro River in St. Thomas, Martha Brae River in Trelawny, and Spanish River in Portland – have combined potential generating capacity of more than 19 MW. This could serve to almost double the existing hydropower capacity on the island. The four waterways could generate as much as 75 GWh annually and as such represent viable options for providing affordable electricity to the national grid.

In addition, preliminary capital cost estimates and financial analyses from pre-feasibility studies suggest that the schemes could provide energy to the national grid at costs ranging from $8.48 to $13.25 per kWh. Based on the strength of findings from the initial assessment of the technical, economic and financial viability of each site, along with the social and environmental impacts and risks of the projects, full feasibility studies are now in progress and should be completed by August 2014.

— ***Biofuels*** – through collaboration between PCJ and the Ministry of Agriculture and Fisheries, the biodiesel pilot project continued its third year of operation with Researchers at Bodles Agricultural Research Station in St. Catherine. The pilot project is being conducted over a five-year period to determine the production parameters for biodiesel from castor and jatropha plants.

— ***Wind & Solar*** – a National Wind Resource Assessment was completed by Wigton Windfarm Limited. The study was carried out under a Wind and Solar Development Programme which is being financed through an agreement between the IDB and the PCJ. An evaluation of 24 prospective sites across the island highlighted four locations suitable for wind energy development – Winchester at the foot of the John Crow Mountains in St. Thomas, Kemps Hill in Clarendon, Rose Hill and Top Lincoln in Manchester. These combined have the potential of generating capacity of 212 GWh annually which could reduce national oil consumption by at least 124 706 barrels per year trimming close to $1.27 billion off the annual energy bill. It should be noted that the Rose Hill site was earmarked by Wigton for the addition of a 24 MW generating facility to its existing wind farm complex, following their successful RE bid. The construction phase of this expansion project is scheduled to get underway by August 2014 with an anticipated commissioning date of August 2015.

Another RE Initiative under development is the ***Caribbean Hotel Energy Efficiency and Renewable Energy Action – Advanced Program (CHENACT-AP).*** This project is geared towards improving the competitiveness of small and medium sized hotels (those with less than 400 rooms) in the Caribbean region through efficient use of energy, with emphasis on renewable energy and micro-generation. The pilot project, underway in Barbados, was also undertaken in the Jamaican hotel sector with the following achievements:

— the launch of the Caribbean Hotel Energy Action Plan and completion of ozone depleted substance (ODS) audits in 10 hotels in the western region

— the launch of the first edition of the online tutored course, "Implementing Renewable Energy and Energy Efficiency in the Hotel Industry in the Caribbean." The course was offered to members of the Jamaica Hotel and Tourist Association (JHTA) and the Caribbean Hotel and Tourism Association (CHTA) to: i) assist with the development of maintenance staff to further their knowledge of new Energy Efficiency and Renewable Energy Technologies; and ii) to use that knowledge to assist the hotel to obtain funding for those technologies.

PERFORMANCE

International Oil Market

World oil demand expanded by 1.2 million barrels per day (mbd) to 91.2 mbd in 2013 relative to 2012 and marked the fourth consecutive year of growth (Table 15.1). The

TABLE 15.1
WORLD OIL DEMAND 2009- 2013
(Million Barrels per day)

	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012 2011	% Change 2013 2012
OECD	46.3	46.9	46.5	45.9	46.0	-1.3	0.2
Americas	23.7	24.1	24.0	23.6	24.0	-1.7	1.7
Europe	14.7	14.7	14.3	13.7	13.6	-4.2	-0.7
Asia Oceania	8.1	8.2	8.2	8.6	8.4	4.9	-2.3
TOTAL NON-OECD	39.1	41.4	42.5	44.0	45.2	3.5	2.7
Former Soviet Union	4.0	4.1	4.4	4.5	4.6	2.3	2.2
Latin America	5.7	6.1	6.2	6.4	6.6	3.2	3.1
China	7.9	8.9	9.3	9.8	10.1	5.4	3.1
Others a	21.5	22.2	22.6	23.4	23.9	3.5	2.1
TOTAL DEMAND	85.4	88.4	89.0	90.0	91.2	1.1	1.3

a. - Other Asia, Middle East, Africa, Europe
p - preliminary
r - revised
Discrepancies in table may be due to rounding.

Source: International Energy Agency

TABLE 15.2
WORLD OIL SUPPLY 2009 - 2013
(Million barrels per day)

	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
OPEC	34.0	34.7	35.8	37.6	36.8	5.0	-2.1
OECD Supply	18.9	18.9	19.0	19.9	21.0	4.7	5.5
Americas	13.6	14.1	14.6	15.9	17.2	8.9	8.2
Europe	4.5	4.2	3.8	3.5	3.3	-7.9	-5.7
Asia Oceania	0.6	0.7	0.6	0.6	0.5	0.0	-16.7
NON-OECD Supply	29.0	29.9	29.9	29.5	29.6	-1.3	0.3
Former Soviet Union	13.3	13.5	13.5	13.6	13.8	0.7	1.5
Latin America	3.9	4.1	4.2	4.2	4.2	0.0	0.0
China	3.8	4.1	4.1	4.2	4.2	2.4	0.0
Others a	8.0	8.1	8.0	7.5	7.3	-6.3	-2.7
Processing Gains	2.0	2.1	2.1	2.1	2.2	0.0	4.8
Global Biofuels	1.6	1.8	1.9	1.9	2.0	0.0	5.3
TOTAL NON-OPEC	51.4	52.7	52.9	53.4	54.7	0.9	2.4
TOTAL SUPPLY	85.4	87.4	88.7	91.0	91.6	2.6	0.7

a. - Other Asia, Middle East, Africa, Europe
p - preliminary
r - revised
Discrepancies in table may be due to rounding.

Source: International Energy Agency

improvement was supported by continued recovery in some world economies, as evidenced by growth in demand by both OECD and non-OECD countries. The non-OECD countries were the main drivers, recording an increase of 2.7 per cent to 45.2 mbd. Led by China with a 3.1 per cent increase to 10.1 mbd, all categories posted higher growth (see Table 15.1). There was, however, a slowing in overall oil production in the non-OECD countries, due in part to currency-related issues; continued efforts at diversifying power demand away from oil, particularly in the Middle East; weaker than anticipated economic activity in some countries; and ongoing political turmoil in Iraq.

Oil demand grew by 0.2 per cent to 46.0 mbd in OECD countries, fuelled mainly by a 1.7 per cent growth in Americas to 24.0 mbd, as declines were recorded in Europe and the Asia Oceanic. Following two consecutive years of decline, the performance in OECD Americas represented a turnaround, and reflected increases in industrial and transportation fuel demand. The demand in Europe dipped, as the stimulus provided in the post-recessionary period weakened.

Global oil supplies grew by approximately 600 thousand barrels per day to 91.6 mbd in 2013. This resulted from an increase in Non-OPEC supplies, up 2.4 per cent to 54.7 mbd, which more than offset the fall-off in supplies from OPEC, down 2.1 per cent to 36.8 mbd. The expansion in Non-OPEC supplies was supported mainly by increased supplies of 5.5 per cent to 21.0 mbd in the OECD group as the Non-OECD increased by 0.3 per cent to 29.6 mbd (Table 15.2). Higher OECD production stemmed from increased output for the Americas reflecting mainly earlier large scale investments, to include horizontal drilling and hydraulic fracturing. Increased shale oil production from the US States of Texas and North Dakota[6] coupled with expansion in supplies from Alaska and increased production from Canada's oil sands contributed to the improvement in OECD supplies. Europe and the Asia Oceanic recorded declines in production. The out-turn in the Non-OECD category was driven mainly by improved out-turn in the Former Soviet Union, and was supported by the Global Biofuels category[7]. The output from Latin America and China remained unchanged, while the category Others recorded a decline (see Table 15.2).

The spot peak price of crude oil on the international market fell by 0.9 per cent to average US$104.09 per barrel. The reduction in the annual average price represented the net effect of price movements in the benchmark markets:

— UK Brent, down 2.8 per cent to US$108.9 per barrel

— Dubai, down 3.2 per cent to US$105.4 per barrel

— West Texas Intermediate (WTI), up 4.0 per cent to US$98.0 per barrel.

The divergence in prices between the WTI (the US mid-continent price) and the Brent (the international marker) was attributed to the stock build-up in the USA, which served to lower prices. The stock build-up was brought about by the aforementioned rapid expansion of unconventional oil

6 According to the World Bank's publication "Global Economic Prospects" (January 2014) currently these states, where most of the shale oil production take place, account for almost half of the total US crude oil supplies, up from 25.0 per cent three years ago.

7 Global Biofuels comprise all world biofuel production, including fuel ethanol from USA and Brazil.

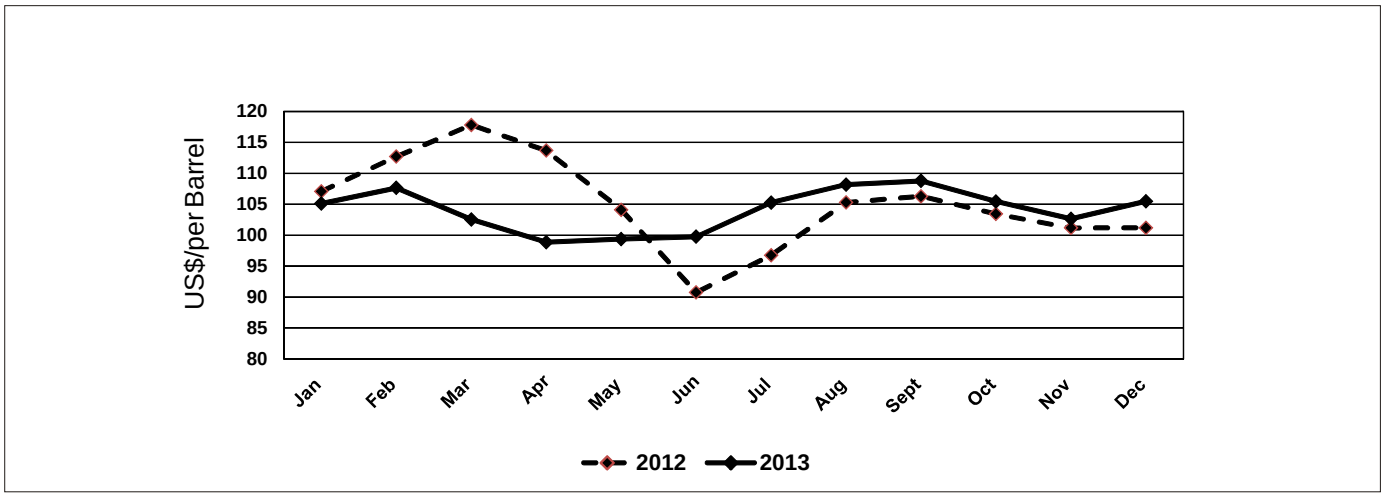

FIGURE 15B: M**ONTHLY AVERAGE SPOT PEAK PRICE MOVEMENTS FOR CRUDE, 2012 AND 2013)**

production in the USA (shale liquid production) and Canada (oil from tar sands), which occurred against the background of a moderation in oil consumption in the USA.

Average prices during the year fluctuated within a tight band, commencing the year at US$105.10 per barrel and ending the year at US$105.48. The lowest price was reported for April (US$98.85per barrel) and the highest for September (US$108.76 per barrel). The fluctuation in prices was driven mainly by: i) supply side issues such as the geopolitical concerns in Egypt and Syria and output disruptions in Iraq and Libya; and ii) on the demand side, macroeconomic concerns initially brought about by the European debt issues and later, vulnerabilities in the global economy resulting in a moderation in growth prospects. The reduced growth prospects were evidenced, among other factors, by:

— the anticipated slower economic growth in China

— the weaker than anticipated performance of the US economy, given doubts associated with demand prospects as the US stimulus spending tapered off

— the weak economic outlook for the Eurozone, given the spiralling levels of unemployment

— the downgrading of Greece to emerging market status, which was viewed as a worrying precedent.

Domestic Market

Average Billing Prices

The average billing prices for the petroleum products surveyed on the local market were higher compared with 2012 (Table 15.3). The increases reflected: i) the upward

TABLE 15.3
AVERAGE BILLING PRICES FOR SELECTED PETROLEUM PRODUCYS, 2009 - 2013
($/litre)

						% Change	
	2009	2010	2011	2012	2013[p]	2012 2011	2013 2012
ADO	61.24	81.12	99.81	104.85	114.71	5.0	9.4
Fuel Oil	37.56	45.45	61.41	67.00	72.60	9.1	8.4
LPG	30.86	40.02	49.27	45.08	49.45	-8.5	9.7
Unleaded 87	60.26[a]	n/a	n/a	n/a	n/a	-	-
Unleaded 90	61.74[a]	n/a	n/a	n/a	n/a	-	-
E10 - 87	60.06	81.10	95.87	102.01	111.02	6.4	8.8
E10 - 90	70.50[b]	82.78	97.52	103.67	112.68	6.3	8.7
Kerosene	54.45	82.77	103.06	106.59	115.66	3.3	8.6
USLD	-	-	-	-	140.62[c]	-	-

p - preliminary
n/a - not applicable as product was introduced in November 2008 and 2009
a - represents average for January - October 2009
b - represents average for November and December 2009
c - represents average for July - September 2013

Source: Compiled from data provided by Petrojam Refinery

movement in the prices in the benchmark WTI market, to which local prices are linked. and ii) the depreciation in the local exchange rate. The prices for all petroleum products increased, ranging from $49.45 per litre for Liquid Petroleum Gas (LPG) to $115.66 per litre for Kerosene. This compared with a range of $45.08 per litre and $106.50 per litre for LPG and Kerosene, respectively, in 2012. Ultra low sulphur diesel (ULSD) was introduced to the market on June 24, 2013. By the end of the week (June 27, 2013) the price for USLD averaged $145.19 per litre. The average price moved to $141.01 per litre for December 2013. This translated to an average of $140.62 per litre for 2013[8] (see Table 15.3).

Production

Petrojam's production for most of the petroleum products surveyed contracted relative to the previous year, reflecting in the main, a reduction in demand. For 2013, there was lower production of:

- Liquid Petroleum Gas (LPG), down 35.2 per cent to 68 813 barrels
- E10 – 87, down 7.3 per cent to 1 051 319 barrels
- ADO, down 18.1 per cent to 1 227 642 barrels
- Asphalt, down 21.7 per cent to 108 523 barrels.

On the other hand, increased production was recorded for Heavy Fuel Oil, up 1.7 per cent to 4 666 657 barrels and Marine Diesel Oil/ADO Bunker, up 10.7 per cent to 171 191 barrels. The fall-off in ADO may be linked to reduced sales to JPS as evidenced by the flat out-turn in the amount of electricity generated for the year. Asphalt production recorded two consecutive years of decline, due to the completion of projects such as the East West link of Highway 2000; the temporary cessation of work on the Linstead – Moneague leg of the North-South link of Highway 2000 and the Jamaica Infrastructure Development Programme (JDIP)[9]; as well as the scaling down of road work activities associated with the Jamaica Emergency Employment Programme (JEEP).

Imports of Crude Oil & Petroleum Products

The value dipped by 2.0 per cent to US$881.0 million, reflecting a decline of 3.1 per cent in the volume to 8.5 million barrels, which outweighed the impact of a 1.1 per cent increase to US$103.16 in the average cost per barrel of oil purchased (Table 15.4A). Venezuela continued to be Jamaica's largest supplier of crude oil – although supply fell by 4.2 per cent compared with 2012 – as the government continued to benefit from the favourable terms of the 2004 Petro-Caribe Energy Cooperation Agreement[10]. Imports from Mexico remained relatively unchanged at approximately 1.7 million barrels.

Petrojam imported approximately US$853.3 million worth of finished products, 0.9 per cent more than in 2012 (Table 15.4B). The higher cost reflected growth in expenditure on E10–87 and E10–90 associated with the increased volumes.

The Bauxite/Alumina sub-industry imported approximately US$335.2 million worth of petroleum products compared with US$271.0 million in 2012 (see Table 15.4B). This was attributed to increased production of bauxite and alumina during the year. However, reflecting the sluggishness in the domestic market, the value of imports by the petroleum marketing companies was US$114.6 million, a decline of 29.6 per cent relative to 2012. The country's oil bill (total value of crude oil and refined product imports) was approximately US$5.6 million higher than the approximately US$2.2 billion for 2012. The increase relative to 2012 mainly reflected higher demand by the Bauxite Companies (see Table 15.4B).

Petrojam Sales

Petrojam recorded mixed sales for 2013 as follows:

TABLE 15.4A
VOLUME AND VALUE OF CRUDE OIL IMPORTS, 2011- 2013

	2011[r]		2012[r]		2013[p]		% Change 2012/2011		% Change 2013/2012	
	Volume ('000 Bls.)	Value ('000 US $)	Volume ('000 Bls.)	Value ('000 US $)	Volume ('000 Bls.)	Value ('000 US $)	Volume	Value	Volume	Value
REFINERY										
Venezuelean Crude	7 476.8	750 668.4	7 116.4	722 656.0	6 816.3	699 132.9	-4.8	-3.7	-4.2	-3.3
Mexican Crude	1 386.8	150 303.0	1 700.5	176 580.5	1 724.5	181 914.3	22.6	17.5	1.4	3.0
TOTAL CRUDE OIL	8 863.6	900 971.4	8 816.9	899 236.0	8 540.8	881 047.2	-0.5	-0.2	-3.1	-2.0
Average cost per barrel for crude oil (US$)		101.65		101.99		103.16		0.3		1.1

Bbls - Barrels
US $ - United States Dollars
p - preliminary
r - revised

Source: Compiled from data supplied from the Petrojam Refinery.

8 The average for 2013 represents the period July – December 2013.
9 JDIP is a five-year US$400.0 million programme funded by the China EXIM Bank and the GOJ. The programme seeks to upgrade and enhance the country's land-based transport infrastructure (road network).
10 Under this arrangement, the Government of Venezuela supplies 23 500 barrels of petroleum products (crude and refined products) per day to Jamaica at favourable payment terms.

TABLE 15.4B
VOLUME AND VALUE OF PETROLEUM PRODUCTS IMPORTS, 2011 - 2013

	2011[r]		2012[r]		2013[p]		% Change 2012/2011		% Change 2013/2012	
	Volume ('000 Bls.)	Value ('000 US $)	Volume ('000 Bls.)	Value ('000 US $)	Volume ('000 Bls.)	Value ('000 US $)	Volume	Value	Volume	Value
PETROJAM										
LPG	754.8	62 584.4	758.4	55 145.0	611.5	40 173.4	0.5	-11.9	-19.4	-27.1
E10 - 87	1 187.6	141 858.4	1 531.1	194 712.8	1 664.0	202 525.2	28.9	37.3	8.7	4.0
E10 - 90	284.9	37 292.6	289.0	37 715.2	511.7	61 703.3	1.4	1.1	77.1	63.6
Jet Fuel/Kerosene	760.2	98 517.0	721.6	96 220.1	612.0	78 958.6	-5.1	-2.3	-15.2	-17.9
MTBE	0	0	0	0						
Automotive Diesel Oil	2 131.5	268 339.9	1 832.4	235 291.0	1 780.4	222 338.2	-14.0	-12.3	-2.8	-5.5
Heavy Fuel Oil	1 745.4	177 578.6	2 112.4	226 563.3	2 091.7	205 831.0	21.0	27.6	-1.0	-9.2
BAUXITE COMPANIES										
Bunker C	1 397.4	125 080.9	1 380.1	141 223.8	1 429.4	137 362.6	-1.2	12.9	3.6	-2.7
Low Vanadium ADO	2 114.3	197 417.3	1 280.2	129 740.7	2 140.8	197 837.2	-39.5	-34.3	67.2	52.5
MARKETING COMPANIES										
Refined Products	1 631.3	186 327.0	1 241.6	157 574.3	1 085.9	109 994.9	-23.9	-15.4	-12.5	-30.2
Lubricants	34.7	11 954.1	15.5	5 098.8	15.9	4 586.6	-55.3	-57.3	2.6	-10.0
TOTAL CRUDE		900 971.4		899 236.0		881 047.2		-0.2		-2.0
GRAND TOTAL		2 207 921.6		2 178 521.0		2 184 110.5		-1.3		0.3

Bbls - Barrels
US $ - United States Dollars
p - preliminary
r - revised

Source: Compiled from data supplied from the Petrojam Refinery, Bauxite Mining Companies & Petroleum Marketing Companies

— Marine Diesel Oil (MDO)/ ADO Bunker – 5 547 barrels (down 54.0 per cent)

— Turbo Fuel/Kerosene – 7 299 barrels (down 34.8 per cent)

— Asphalt – 109 073 barrels (down 22.3 per cent)

— Liquid Petroleum Gas – 685 498 barrels (down 18.9 per cent)

— Automotive Diesel Oil (ADO) – 2 627 688 barrels (down 14.3 per cent)

— E10-87 – 2 144 360 barrels (down 1.6 per cent)

— E10-90 –1 288 573 barrels (up 12.0 per cent)

— Fuel Oil – 5 352 308 barrels(up 4.4 per cent)

The reduction in sales for some products was due for the most part to reduced demand. Contraction in sales of some products, particularly for ADO, may be linked to, reduced sales to JPS, while the decline in the sale of Asphalt must be viewed against the background of the completion of several road projects during the year, including the Washington Boulevard Improvement Project, the Palisadoes Shoreline & Rehabilitation Works and the Sandy Bay leg of Highway 2000.

Energy Consumption

Jamaica's overall energy consumption during 2013 was approximately 20 407 000 Barrel Oil Equivalent (BOE) compared with 20 294 000 BOE in 2012. This was due to a 20.6 per cent increase in consumption from Alternative Energy sources to 1 223 000 BOE, which outweighed the 0.5 cent drop to 19.2 million BOE in consumption from Petroleum-based sources. Higher consumption from Alternative Energy sources reflected increased consumption from coal and wind sources, up 58.5 per cent to 450 000 BOE and 6.0 per cent to 71 000 BOE, respectively. Further growth was, however, stymied by a 17.2 per cent decline in consumption from hydropower sources to 77 000 BOE (see Table 15.5). The majority of the Petroleum-based sources recorded declines in consumption, due mainly to lower demand. ADO recorded the largest decrease from 3.6 million barrels to 3.2 million barrels, followed by Fuel Oil, which fell from 9.2 million barrels to 9.1 million barrels. E10-90 recorded the largest growth in consumption, rising to 1.7 million barrels from 1.4 million barrels, followed by Turbo Fuel which increased to 2.0 million barrels from 1.8 million barrels.

Petroleum consumption was lower for most activities (Table 15.6). Electricity Generation recorded the largest absolute decline of 395 358 barrels in petroleum consumption to 5 718 995 barrels. This reflected weakened demand, resulting from the relatively lacklustre performance of the local economy, increased conservation practices, as well as the increasing number of customers using alternative energy options, such as Photovoltaics (PVs)

The reduction in petroleum products used in:

— bauxite/alumina processing was associated with increased production efficiency as production rose, due, in part, to the use of more efficient technology

— residential category reflected increased availability of energy saving appliances and lighting, as well as the increasing application of energy conservation practices

— sugar manufacturing, due to fall-off in sugar cane reaped in 2013 as well as improved efficiency

TABLE 15.5
JAMAICA'S TOTAL ENERGY CONSUMPTION, 2009 - 2013

ENERGY SOURCE	UNIT OF MEASURE ('000 Barrels)	2009	2010	2011[r]	2012[r]	2013[p]	% Change 2012 / 2011	% Change 2013 / 2012
PETROLEUM BASED								
	"	0	0	0	3	1	-	-66.7
Turbo Fuel	"	1 661	2 017	1 879	1 795	2 000	-4.5	11.4
LPG	"	874	939	974	953	897	-2.1	-5.9
'Kerosene	"	17	13	13	11	10	-15.5	-9.0
Gasoline	"	2 821	0	0	0	0		
E10-87	"	1 755	2 876	2 743	2 690	2 721	-1.9	1.1
E10-90	"	185	1 417	1 399	1 448	1 664	3.5	14.9
ADO	"	3 698	3 545	3 724	3 584	3 249	-3.7	-9.4
ADO Bunker	"	195	178	165	157	138	-4.6	-12.4
Fuel Oil	"	10 503	9 480	10 105	9 226	9 119	-8.7	-1.2
TOTAL PETROLEUM	"	21 709	20 465	21 002	19 868	19 799	-5.4	-0.3
TOTAL PETROLEUM BARRELS OF OIL EQUIVALENT (BOE)		21 110	19 449	19 807	19 280	19 183	-2.7	-0.5
ALTERNATIVE ENERGY								
Hydropower	MWh	140	152	152	151	124	-0.7	-17.9
	('000 BOE)	87	94	94	93	77	-1.1	-17.2
Wind		59	53	91	107	115	17.6	7.5
		36	33	57	67	71	17.5	6.0
Coal	('000 Tonnes)	63	54	65	56	89	-13.8	58.9
	('000 BOE)	316	271	327	284	450	-13.1	58.5
Charcoal - BOE	('000 BOE)	n/a	n/a	n/a	n/a	n/a	-	-
Bagasse - BOE	('000 BOE)	402	418	579	570	626	1.6	9.8
Fuelwood - BOE	('000 BOE)	n/a	n/a	n/a	n/a	n/a	-	-
ALTERNATIVE ENERGY - BOE	('000 BOE)	841	816	1 057	1 014	1 223	-4.1	20.6
TOTAL PETROLEUM & ALTERNATIVE ENERGY	('000 BOE)	21 951	20 265	20 864	20 294	20 407	-2.7	0.6

r - revised
p - preliminary
n/a - not available
BOE - Barrel of Oil Equivalent

Source: Compiled from data supplied by the Ministry of Science, Technology, Energy & Mining

TABLE 15.6
PETROLEUM CONSUMPTION BY ACTIVITY, 2009 - 2013
(Barrels)

ACTIVITY	2009	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012 / 2011	% Change 2013 / 2012
Road & Rail Transportation	6 402 737	5 945 220	6 012 476	6 060 084	6 341 969	0.8	4.7
Shipping	2 221 514	1 868 525	1 634 809	1 405 023	1 370 487	-14.1	-2.5
Aviation	1 660 579	2 016 839	1 878 787	1 857 082	2 001 160	-1.2	7.8
Cement Manufacture	12 638	6 844	11 698	26 338	16 262	125.1	-38.3
Electricity Generation	6 661 735	6 579 797	6 529 445	6 114 353	5 718 995	-6.4	-6.5
Bauxite/Alumina Processing	3 493 973	2 893 641	3 752 927	3 316 616	3 253 410	-11.6	-1.9
Sugar Manufacturing	57 046	15 045	15 464	18 213	17 225	17.8	-5.4
Residential	883 418	952 660	987 844	964 062	906 974	-2.4	-5.9
Petroleum Refining	309 666	268 039	287 237	317 309	247 189	10.5	-22.1
Other Manufacturing	104 947	59 705	97 373	43 277	27 274	-55.6	-37.0
Other	99 334	127 499	82 279	122 276	199 193	48.6	62.9

p - preliminary
r - revised

Source: Compiled from data supplied by the Ministry of Science, Technology, Energy & Mining

TABLE 15.7
PETROLEUM CONSUMPTION BY PRODUCT, 2009 - 2013
(Barrels)

	2009	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
PRODUCT							
Aviation Gasoline	0	125	252	2 594	1 373	929.4	-47.1
Turbo Fuel	1 660 579	2 016 714	1 878 535	1 854 488	1 999 787	-1.3	7.8
Unleaded 87	1 763 916	0	0	0	0		
Unleaded 90	1 056 605	0	0	0	0		
E10 - 78	1 755 494	2 876 269	2 742 648	2 690 130	2 721 395	-1.9	1.2
E10 - 90	184 573	1 417 433	1 399 303	1 447 601	1 663 926	3.5	14.9
Kerosene	17 274	13 445	13 485	10 984	10 006	-18.5	-8.9
ADO	3 698 390	3 545 285	3 724 232	3 584 494	3 248 538	-3.8	-9.4
ADO Bunker	194 542	177 700	165 249	157 482	149 029	-4.7	-5.4
Ultra Low Sulphur Diesel	0	0	0	0	43 252		
Fuel Oil (Bunker C)	6 288 352	5 744 166	6 557 422	6 051 771	7 150 289	-15.1	-98.2
Heavy Fuel Oil	2 026 972	1 690 825	1 469 560	1 247 541	22 015	-7.7	18.2
Fuel Oil (Low Vanadium)	2 187 387	2 044 598	2 078 058	1 927 163	1 946 371	-7.3	1
LPG	874 435	939 215	974 360	953 077	896 968	-2.2	-5.9
Lubricants	42 608	55 816	44 805	31 224	17 836	-30.3	-42.9
Asphalt	51 827	74 533	136 272	136 891	111 261	0.5	-18.7
Other	0	0	0	0	0		0

r - revised
p - preliminary

Source: Compiled from data supplied by the Ministry of Science, Technology, Energy & Mining

The declines outweighed the higher petroleum consumption for Road & Rail Transport, which recorded the largest increase of 281 885 barrels. Aviation activity followed with an increase in petroleum consumption of 144 078 barrels.

Reduced demand for most petroleum products resulted in lower consumption levels (Table 15.7). Inflated prices for some products as well as increased conservation measures were among the factors contributing to the weakened demand. There was also a positive relationship between the declines in the consumption of some products and associated activities. These included: Turbo Fuel in Aviation; E10-87 and E10-90 in Transportation activities; Kerosene and LPG in Residential activities; ADO Bunker, Heavy Fuel Oil and ADO in Electricity Generation and Transportation (see Tables 15.6 and 15.7). The reduced consumption of Asphalt was due to lower demand for the product in 2013 relative to 2012, when the demand was higher as several road infrastructure works were underway.

ELECTRICITY

Generating Capacity

The country's generating capacity remained at 896.5 megawatts (MW) during 2013. There were no new capacity expansions of existing power plants or addition of new plants to the grid, unlike in 2012 when the new West Kingston Power Plant (WKPP) was commissioned. At the end of 2013, JPS was in the final stages of testing its new hydroelectric generating plant – the Maggotty Hydro Plant. The expansion is the largest hydroelectric development to take place in Jamaica since independence. The new hydro plant was developed at a cost of over US$36.0 million, and will provide up to a maximum of 7.2MW of electricity to the national grid during periods of high stream flows[11]. Renewables as a proportion of net electricity generation was 5.8 per cent (which includes wind and hydro). This should be expanded in the medium-term as plans to add 78MW of capacity from renewables were advanced during the year. This is consistent with plans to diversify the grid through renewable sources – increasing the percentage of renewables in the energy mix to 20.0 per cent by 2030, as articulated in *Vision 2030 Jamaica – NDP.*

Generation

The amount of electricity generated[12] totalled 4 141.6 GWH compared with 4 136.0 GWH during 2012 (Table 15.8); the first increase in three years. This out-turn was attributed mainly to a 16.7 per cent increase in generation from non-JPS sources to 1 799.5 GWh, which was boosted by the commissioning of the new 65.5MW WKPP generating plant during the April–June quarter of 2012. This year marked the plant's first full year of operation, but will not generate at full capacity until one to two years after being commissioned. Generation from non-JPS sources accounted for 43.5 per cent of the total electricity generation, its largest share ever, up from 37.2 per cent in 2012.

11 The plant was commissioned in to service at the end of January 2014.
12 Total generation includes net generation from JPSCo. plus generation (purchases) from non-JPSCo. sources and represents the amount of electricity put to the grid.

TABLE 15.8
JPSCo: GENERATING CAPACITY, OUTPUT, HEAT RATE & FUEL CONSUMPTION, 2009 - 2013

	UNIT	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
GENERATING CAPACITY	MW	817.8	830.5	831.0	896.5	896.5	7.9	0
Steam		292	292	292.0	292.0	292.0	0	0
Hydro		21.6	22.4	22.8	22.8	22.8	0	0
Slow Speed Diesel		36	40	40.0	40.0	40.0	0	0
Gas Turbine		271.5	279.5	279.5	279.5	279.5	0	0
Purchase Power		197	197	197	262.2	262.2	33.1	0
INDEPENDENT PRODUCERS	MW							
Wartsilla		124.4	124.4	124.4	124.4	124.4	0	0
JEP/WKPP		n/a	n/a	n/a	65.5	65.5		0
Jamalco		11	11	11	11	11	0	0
JPPC		61.3	61.3	61.3	61.3	61.3	0	0
WIGTON[a]		20	20	38.7	38.7		0	-100
NET OUTPUT	GWh	2 867.1	2 793.9	2 725.6	2 593.6	2 342.2	-4.8	-9.7
Steam		1 470.3	1 397.3	1 293.8	1 220.2	1 212.5	-5.7	-0.6
Slow Speed Diesel		255.5	276.1	289.5	280.3	286.9	-3.2	2.4
Hydro		140.7	151.7	152.1	150.7	123.7	-0.9	-17.9
Gas Turbines		1 001.2	968.8	990.1	942.4	719.1	-4.8	-23.7
NON-JPSCo. SOURCES	GWh	1 346.9	1 343.5	1 411.3	1 542.3	1 799.5	9.3	16.7
TOTAL OUTPUT	GWh	4 214.0	4 137.4	4 137.0	4 136.0	4 141.6	0	0.1
TOTAL SYSTEM HEAT RATE	KJ/kWh	10 167	10 183	10 112	9 965	9 884	-1.5	-0.8
TOTAL FUEL CONSUMPTION	000 Barrels	5 021.8	4 925.2	4 799.1	4 514.1	4 141.3	-5.9	-8.3
TOTAL FUEL COST	$'000	32 090 980	38 478 565	50 062 489	50 189 713	48 945 003	0.3	-2.5

p - preliminary
a - not included in total generating capacity as it is not considered firm capacity

Source - Compiled from data provided by the JPS.

Generation from JPS sources declined by 9.7 per cent to 2 342.2 GWH, the fourth consecutive year of decline. The contraction during 2013 was attributed to, among other things, reduced generation from the company's units, due to:

— the increased utilization of the Independent Power Producers (IPPs)

— forced outages at the Combined Cycle Plant at the Bogue Power Station, Montego Bay, which resulted 40MW being unavailable for six months (a reduction in net generation of 162 GWh compared to 2012)

— dry weather conditions throughout the year which caused the company's Hydro plants to underperform. In addition, the existing Maggoty Plant was taken offline for six months to allow for major overhaul of the A unit as well as to facilitate the addition of a new unit.

Heat Rate, Fuel Consumption and Fuel Cost

Total system heat rate improved to 9 884 kJ/kWh from 9 965 KJ/kWh in 2012 (see Table 15.8). This marked three consecutive years of improvement and was due partly to the operations of the new 65.5 MW plant. Total fuel consumption decreased by 8.3 per cent to 4 141.3 thousand barrels, the fourth consecutive year of decline. Fuel consumption was impacted by relatively lower demand. Fuel cost decreased by 2.5 per cent to $48.9 billion, reflecting: a) the impact of market prices (the spot peak price of crude oil) which fell by 0.9 per cent; and b) the failure at the Bogue station resulted in increased generation from the IPPs (which use a cheaper fuel) to satisfy demand.

Electricity Disposal & Revenue

Electricity sales decreased from 3 090.2 GWh in 2012 to 3 025.8 GWh (Table 15.9), representing 73.1 per cent of total generation. Line Losses & Unaccounted for Net Generation accounted for 26.6 per cent at 1 103.2 GWh while Company Use, at 12.7 GWh, accounted for the remaining 0.3 per cent.

The reduced sales were due mainly to a fall in demand, which occurred despite a 2.3 per cent increase in the company's customer base. This reflected the dull economic environment, increased conservation practices and customers switching to alternative energy sources. Consequently, most consumer categories recorded reduced sales. The Residential category was the largest contributor to the decline, recording a 3.8 per cent fall to 986.2 GWh, followed by the General Service category, down 2.3 per cent to 578.4 GWh. Large Power (down by 1.6 per cent to 599.2 GWh) and Power Service (down by 0.4 per cent to 762.1 GWh) were the other categories which recorded decreased sales. These outweighed increased sales to the categories Other and Street Lighting, up by 2.3 per cent and 0.5 per cent, respectively. Increased sales to interchange customers, particularly Windalco - Ewarton, continued to fuel the higher sales in the category, Other.

TABLE 15.9
JPSCo: SALES & REVENUE
2009 - 2013

	Unit	2009	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
DISPOSAL OF ELECTRICITY								
Sales:	GWh	3 231.5	3 221.7	3 162.4	3 090.2	3 025.8	-2.3	-2.1
Residential Rate 10		1 091.9	1 107.0	1 051.2	1 025.1	986.2	-2.5	-3.8
General Service Rate 20		670.0	664.6	634.9	591.9	578.4	-6.8	-2.3
Power Service Rate 40		777.6	745.7	771.2	765	762	-0.8	-0.4
Large Power Rate 50		594.6	602.2	607.3	609.2	599.2	0.3	-1.6
Street Lighting Rate 60		70.4	71.0	71.1	70.1	70.4	-1.4	0.4
Other		26.9	31.2	26.8	28.9	29.6	7.8	2.4
Company use	GWh	11.5	13.6	13.2	12.9	12.7	-2.3	-1.6
Line Losses & Other Unaccounted for Net Generation	GWh	971.0	902.1	961.3	1 032.9	1 103.2	7.4	6.8
REVENUE	$ '000	71 519 976	82 292 904	99 198 338	101 421 397	110 083 125.0	2.2	8.5
Residential Rate 10		26 610 727	30 031 136	34 960 594	35 756 371	37 577 241.0	2.3	5.1
General Service Rate 20		16 680 780	18 495 032	22 229 338	21 561 543	23 350 464.0	-3.0	8.3
Power Service Rate 40		15 147 131	17 460 761	22 256 508	23 373 364.0	25 604 866.0	5.0	9.5
Large Power Rate 50		10 559 373	12 939 950	16 212 062	17 146 385.0	18 577 268.0	5.8	8.3
Street Lighting Rate 60		1 779 676	2 176 121	2 544 583	2 618 275.0	2 834 047.0	2.9	8.2
Other [a]		742 110	1 189 905	995 526	965 458	2 139 238.0	-3.0	121.6

a - Includes other generating and other operating revenues.
p Preliminary
r - revised

Source - Compiled from data provided by the JPS

JPS' electricity usage fell from 12.9 GWh in 2012 to 12.7 GWh. Line Losses (technical and non-technical) increased to 1 103.2 GWh from 1 032.9 GWh in 2012, indicating the continued challenge the utility company faces in combatting the theft of service amidst the challenging economic climate and the high price of fuel. Loss reduction activities employed during 2013 included:

— the audits and investigation of over 113 000 accounts

— strike force operation (removal of illegal connections or "throw ups") removing over 198 000 illegal throw ups resulting in the arrest of over 1 200 persons

— replacing old and defective meters

— installation of residential automatic metering infrastructure (RAMI) meters and sub-feeder meters to improve the company's measurement of losses to enable greater understanding of the areas of losses.

However, these efforts continued to be thwarted by illegal users who continuously find more complex methods to illegally abstract the service. The identification of losses has become increasingly difficult due to the significant change in customers usage pattern, resulting from conservation or utilization of alternative sources of energy

The company's revenue expanded by 8.5 per cent to $110.1 billion, the fourth consecutive yearly increase (see Table 15.9). Higher revenues were posted for all categories of customers, due mainly to the combined effect of increases in the rates charged and the number of customers. The enhanced revenue was supported by: a) an effective tariff increase of 0.8 per cent on the non-fuel rates, effected July 1, 2013 (the average fuel tariff increase in 2012 was approximately 1.2 per cent); and b) increase in global oil prices and its impact on the cost of fuel.

Average Consumption and Average Charges

JPS's customer base rose by 2.3 per cent to 600 306, marking the second consecutive year of increase following three consecutive years of decline (Table 15.10). The Residential category recorded the highest increase, with an additional 12 443 customers, a 2.4 per cent increase over 2012. The General Service category followed with an additional 917 customers, 1.5 per cent higher than the previous year (see Table 15.10). Combined, the Residential and General Service categories accounted for 99.6 per cent customer base. The overall growth in the customer base was supported by, among other things, the opening up of new housing developments; the continued implementation of RAMI Project; and regularization of customers resulting from the re-engagement initiatives employed.

The average consumption for most consumer categories declined due to reduced demand, reflecting the lethargic performance of the economy, heightened conservation practices and self-generation, consequent on the new net billing arrangement. The average rates charged to all consumer categories increased, with the General Service category reporting the largest increase of 10.8 per cent. This was followed by Large Power, up 10.2 per cent; Power Service, up 10.0 per cent; Other Generating Companies, up 9.7 per cent; Residential, up 9.2 per cent; and Street Lighting, up 7.7 per cent. The higher average rates in 2013 reflected relatively higher adjustment on the fuel portion of the electricity bill, emanating from the uptick in international crude oil prices, and the upward annual

TABLE 15.10
JPSCo- AVERAGE NO: CUSTOMERS, KWH USED, RATES CHARGED 2009 - 2013

	UNITS	2009	2010[r]	2011[r]	2012[r]	2013[p]	% Change 2012/2011	% Change 2013/2012
RESIDENTIAL - Rate 10								
Customers		520 591	518 141	510 056	523 725	536 168	2.7	2.4
Kwh used	000/KWH	2 097.4	2 136.4	2 061.0	1 957.3	1 839.3	-5	-6.0
Rate charged	Cents/kWh	2 437.1	2 713.2	3 326	3 488.2	3 810.5	4.9	9.2
GENERAL SERVICE - Rate 20								
Customers		60 137	60 190	59 172	61 097	62 014.0	3.3	1.5
Kwh used	000/KWH	11 141.8	11 041.5	10 729.7	9 687.3	9 327.3	-9.7	-3.7
Rate charged	Cents/kWh	2 489.6	2 782.9	3 501.2	3 643	4 037.0	4.1	10.8
POWER SERVICE - Rate 40								
Customers		1 585	1 620	1 669	1 710	1 720.0	2.5	0.6
Kwh used	000/KWH	490 729.5	463 237.7	462 107.5	447 498.6	442 927.2	-3.2	-1.0
Rate charged	Cents/kWh	1 947.8	2 341.6	2 885.9	3 055.3	3 360.1	5.9	10.0
LARGE POWER - Rate 50								
Customers		131	139	146	150	150	2.7	0.3
Kwh used	000/KWH	4 553 607.8	4 335 319.0	4 166 536.3	4 072 906.2	3 994 622.4	-2.2	-1.9
Rate charged	Cents/kWh	1 775.8	2 148.6	2 669.7	2 814.4	3 100.4	5.4	10.2
OTHER GENERATING COMPANIES								
Customers		3	2	2	2	2	0	0
Kwh used	000/KWH	9 485 243.6	15 620 881.0	13 387 168.5	14 466 064.9	14 799 442.6	8.1	2.3
Rate charged	Cents/kWh	1 684.7	1 761.1	2 493.8	2 435.7	2 671.6	-2.3	9.7
STREET LIGHTING - Rate 60								
Customers		218	220	221	254	253	14.9	-0.4
Kwh used	000/KWH	322 759.7	322 981.2	321 844.9	276 280.6	278 534.0	-14.1	0.8
Rate charged	Cents/kWh	2 528.4	3 063.7	3 577.5	3 737.2	4 024.7	4.5	7.7
Total # of Customers		582 663	580 311	571 266	586 937	600 306.0	2.7	2.3

Customers are represented as a 12 month average

p - preliminary
r - revised

Source: JPS

adjustment in the non-fuel portion of the bill (up 0.8 per cent), which accounted for movements in inflation and foreign exchange rates.

WATER

Policies and Programmes

During the year, the process of updating the 2004 Jamaica Water Sector Policy (WSP) as well as developing a Rural Water Supply Development Strategy (RWSDS) commenced. The updating of the Water Sector Policy and the development of the RWSDS was part of a three-fold initiative under the Kingston Metropolitan Area (KMA) Water Supply Improvement Project. Total grant funding from the IDB for the KMA Project was US$1 480 million and included increasing the efficiency of the NWC, and an engineering assessment and tariff study. Under the guidance of a WSP Project Steering Committee, the first draft of the revised policy was completed. The updated policy is, therefore, intended to address identified gaps and assist with meeting the goals of *Vision 2030 Jamaica – NDP*, which is "integrated and sustainable water resources management and development; adequate and safe water supply and sanitation to support the social and economic development of Jamaica". Funding for the project was provided through a Technical Cooperation Grant of US$315 434 by the IDB and counterpart funds of $2.0 million in Fiscal Year 2013/14. The Grant is expected to facilitate the following:

— development of the updated policy aimed at expanding coverage of safe, potable drinking water

— identification of areas without access to potable water and the development of a methodology to determine the most effective least-cost modality of supplying water to the affected communities

— development of a framework to address the cost of Social Water

— development of a framework to manage the impact of climate change on water resource facilities and supplies

— establishment of a framework for expanded coverage of wastewater and sewerage services

— development of more reliable statistics on the water sector

— identification of an improved environment to encourage more private sector participation.

As part of its five-year capital programme, and consistent with *Vision 2030 Jamaica* and government's policy objective,

aimed at making potable water available to all Jamaicans, the NWC pursued several projects during the year including:

— Kingston Water and Sanitation (KWS)

— KMA Water Supply Improvement -

— The Jamaica Water Supply Improvement Project (JWSIP) – Category 'A' Work

— Category 'A1' Works; and Category 'B' Works

— Kingston Metropolitan Area (KMA) W/S Lot 2B

Water projects completed by the NWC included: a) the rehabilitation of the Mona and Hope Water Treatment Plants, St. Andrew; b) Marlborough to Berry Hill Pipeline, Manchester; c) Old Harbour Bay Pipeline, St. Catherine; d) Christiana/Spaulding W/S Christiana-Sedburgh Pipeline, Manchester; e) Palisadoes Pipeline, Kingston; f) KMA (JICA) Lot 2B Pipeline; g) Hounslow to Parottee W/S; and h) Phase1: Hopewell Well to Hill Top Storage Tank, St. Elizabeth (Table 15.11).

Among the work commenced in 2013 was the second component of the Jamaica Water Supply Improvement Project - Category 'B' Works, as well as the Port Antonio Water Sewerage and Drainage Project - Stage 1 and the Upper Montrose / Montrose / Lady Musgrave Avenue Sanitary Sewer in St Andrew, while several contracts were awarded with work scheduled to start in 2014. The Rural Water Supply Limited (RWSL) completed a number of water supply projects islandwide, including: Comfort Hall/Copperwood/ Richmond Hill Water Supply-St James; Wharf Lane W/S and Orange Bay intake Upgrade- Portland; Bamboo Ridge W/S Upgrade St Catherine; Geneva W/S and Amity W/S Westmoreland; Mile Gully/ Warwick Castle W/S St Mary; and Windsor Heights W/S Upgrade St Catherine.

PERFORMANCE

Water Production

The NWC produced approximately 298 029.9 megalitres of potable water, a 1.5 per cent decline compared with production in 2012. The year's output reflected reduced production of 2.5 per cent in Kingston, St. Andrew (KSA) & St. Thomas and 1.1 per cent in Other Parishes (Table 15.12). The parishes that contributed to the decline were KSA, St. Catherine, Trelawny, St. James, Hanover and St. Mary. This was due to a combination of factors:

— over/under estimated readings

— high levels of leakage

— high levels of turbidity forcing shut down of plants

— drought conditions

These factors outweighed benefits gained from the aforementioned completed projects.

TABLE 15.11
WATER PROJECTS, 2013

PROJECTS	OBJECTIVES/DESCRIPTION	STATUS	EXPENDITURE TO DECEMBER, 2011
Comfort Hall/ Copperwood/ Richmond Hill Water Supply, St James.	Major components involved source improvements, pumps, storage facilities and transmission and distribution pipelines. Areas served include Comfort Hall, Copperwood, Richmond Hill and Roehampton, a population of approximately 4 000.	Completed	Approximately $42.0 million
Wharf Lane Water Supply and Orange Bay Intake Upgrade, Portland	For intake upgrade, pipeline installation, pumping facilities and storage tank. The improved supplies will benefit a population of approximately 1 500.	Completed	Approximately $13.0 million
Mile Gully/ Warwick Castle Water Supply, St Mary.	To upgrade Intake, provide chlorination facilities, pumps including solar pump, pipeline installation and, storage tanks to serve a population of approximately	Completed.	Approximately $9.0 million
KMA Water Supply Project JICA: Lot 2B	To improve service standards and meet the increased water demand in South East St. Catherine and Greater Spanish Town. The project involves the rehabilitation of the water supply facilities, including pipeline replacement, refurbishing of water treatment plants and pumping equipment; water resource development and an institutional development programme	Construction of 10km of transmission pipelines from Caymanas Estates to Marley Hill to increase the supply capability along with 3km of distribution reinforcement mains to improve service to communities in Portmore, Greater Portmore and Hellshire. A population of 180 000 persons will be impacted.	Approximately $762.0 million
Kingston Water and Sanitation Project – Rehabilitation of the Mona and Hope Water Treatment Plants	To restore the reliable production output to 16 and 6 imgd to Mona and Hope Water Treatment Plants, respectively. Approximately 293 000 persons in the south eastern quadrant of the Kingston & St Andrew Metropolitan area to be impacted.	Completed	Approximately $1.8 billion
Christiana/Spaulding Water Supply Christiana-Sedburgh Pipeline.	Construction of 2.0 km of 250 mm diameter pipes from the Christiana Town Centre to the Sedburgh Storage Tanks to benefit a population of 25 000 persons.	Completed	Approximately $30.0 million

Source: Compiled from information provided by the Ministry of Water, Land, Environment & Climate Change, NWC and Rural Water Supply Limited

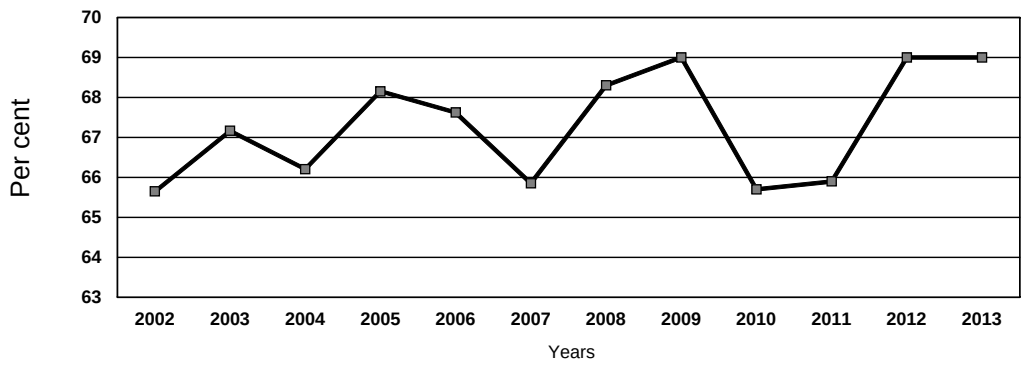

FIGURE 15C: NON-REVENUE WATER AS A PER CENT OF TOTAL PRODUCTION, 2002 - 2013

Water consumption at 92 286.2 megalitres represented a 2.3 per cent decline relative to 2012 (see Table 15.12). The fall-out in KSA & St. Thomas outweighed the higher consumption in Other Parishes. The downturn in consumption stemmed from, among other things, drought conditions during the first four months of the year.

Of the total water produced, approximately 69.0 per cent was non-revenue water (NRW)[13] the same as in 2012 and 66.0 per cent in 2011 (Figure 15C). Approximately 57.7 per cent of the water produced in Kingston, St. Andrew & St. Thomas was NRW compared with 54.5 per cent in 2012. In Other Parishes, 73.2 per cent was NRW compared with to 74.1 per cent in 2012. The general increasing trend of NRW continues to concern the NWC. Consequently, the NWC has embarked on NRW reduction activities which are being addressed through projects such as the KMA Water Supply Improvement Programme, JWSIP Category 'B', JWSIP Category A1; Co-ordination with NWA under the JDIP: and the Rural Water Supply Programme. The NRW reduction aspects of these projects – through a combination of mains replacement and other technical and commercial interventions – are being funded by the K-Factor Programme. The aim is to reduce NRW by 7.0 per cent per year over the next three years.

The number of legitimate NWC water connections increased by 1.2 per cent to 459,563. Higher connections were recorded for both KSA and Other Parishes, up 0.2 per cent to 125 087 and 1.6 per cent to 334 476, respectively (see Table 15.12). The expansion in the number of accounts was attributed mainly to new subdivision developments islandwide; the JWSIP Category 'A' project; and Old Harbour Bay Water Supply Scheme.

TABLE 15.12
DATA ON DOMESTIC WATER, 2009 - 2013

	2009	2010[r]	2011[r]	2012[r]	2013[p]	2012/2011	2013/2012
Amount of Water Produced (Megalitres.)	299 294.0	285 093.1	303 050.6	302 423.8	298 029.2	-0.2	-1.5
Kingston/St Andrew/St. Thomas	80 507.7	75 301.4	82 194.2	81 817.2	79 801.5	-0.5	-2.5
Other Parishes	218 786.3	209 791.7	220 856.5	220 606.5	218 227.7	-0.1	-1.1
CONSUMPTION* (Megalitres.)	92 697.8	97 882.8	103 264.1	94 413.7	92 286.2	-8.6	-2.3
Kingston/St. Andrew/St. Thomas	33 421.5	33 037.2	36 620.1	37 256.5	33 790.2	1.7	-9.3
Other Parishes	59 276.3	64 845.6	66 644.0	57 157.1	58 496.0	-14.2	2.3
NO. OF CONNECTIONS	416 888	435 874	447 261	454 035	459 563	1.5	1.2
Kingston/St. Andrew/St. Thomas	115 614	120 956	125 106	124 828	125 087	-0.2	0.2
Other Parishes	301 274	314 918	322 155	329 207	334 476	2.2	1.6
Revenue ($M)	15 003.6	15 360.5	17 529.8	21 981.1	22 326.5	25.4	1.6
Kingston/St. Andrew/St. Thomas	5 931.5	6 404.7	8 249.9	11 026.1	9 162.1	33.7	-16.9
Other Parishes	9 072.1	8 955.7	9 279.8	10 955.1	13 164.4	18.1	20.2

p - preliminary
r - revised

Source: National Water Commission

13 The difference between production and billed consumption is referred to as non-revenue water. This includes loss as a result of theft, leakage and underestimated consumption.

The company's revenues increased by 1.6 per cent to $22 326.5 million, due mainly to the combined effect of a 16.9 per cent contraction in the KSA and a 20.2 per cent expansion in Other Parishes (see Table 15.12). The growth in revenue may be attributed to the tariff adjustments effected during the year.

UTILITY REGULATION

The Office of Utilities Regulation (OUR), consistent with its regulatory mandate across the utility sector, was engaged in several initiatives in the Electricity sub industry. Foremost among these were activities associated with generation expansion, such as the continuation of the procurement process for the 480 MW of electricity capacity and the 115 MW of generating capacity from renewables. Other matters that detained the OUR were related to:

— ***Demand Forecast Analysis*** – the demand forecast for electricity was reviewed and updated, resulting in changes in the forecast. Planning for the electricity sector is demand driven and therefore it is essential to establish reasonably accurate demand projections. The need for review is necessitated by the dynamic nature of the factors which affect demand, such as economics, demography and technology

— ***Generation Code and Transmission and Distribution (T&D) Codes*** – the Electricity Utility Generation Code, July 2013, was completed and posted on the OUR's website. A complete revision of the Code was commissioned in 2008. The Code covers the guiding principles, operating procedures and technical standards governing the operation of the Jamaican power system grid and all interconnected generating facilities. The Code also seeks to facilitate the economic, safe and reliable operation of the grid and to avoid any undue discrimination among independent generators. The provisions of the Code are enforceable under the OUR Act. With regard to the T&D codes, the drafts were completed but their finalization will follow the completion of work on the 115 MW renewable energy project. The T&D Codes incorporate, among other things, the principles and procedures governing the grid operator's relationship with all users of the transmission and distribution systems. The Codes seek to define the day-to-day procedures for both planning and operational activities, and cover both normal and exceptional circumstances.

Activities related to the ***Water sub-industry*** were focused on continued access to safe and adequate water supply, and improvement in efficiency in its delivery. Accordingly, approval was granted during the 2013 review for the continuation of the K-Factor Fund, with provision for improved monitoring and reporting. The initial approval, which was granted in 2008, ensures that a proportion of revenue collected from customers go directly to infrastructure improvement. As at July 31, 2013, projects approved amounted to 100 with an estimated cost of $31.0 billion were approved by the OUR for funding under the K-Factor Programme[14]. At the end of December 2012, approximately 79 projects, costing an estimated $15.7 billion, were approved by the OUR for funding under the K-Factor Programme.

The OUR also completed the NWC Tariff review in October 2013. This review determined the rates to be charged over the next five-year period. A notable change in the review was a directive that NWC provide separate tariffs for water and sewerage. An overall adjustment of 16.0 per cent was granted, which translated into increases of 18.0 per cent and 8.0 per cent in water rates and sewerage rates, respectively. In addition to the tariff review, other NWC-related activities carried out included ongoing monitoring of the company's financial and operational reports and review of the Price Adjustment Mechanism (PAM). The new base rates for the annual PAM was readjusted, effective April 2013.

OTHER DEVELOPMENTS

Oil and Gas Exploration

The oil and gas exploration activities during 2013 followed promotional activities undertaken during the previous year. The PCJ fielded several exploration interests and facilitated field trips and data room visits with over 10 proven frontier explorers in the oil and gas upstream industry including major, super majors, large independents and even upstarts. Also, in an effort to strengthen the understanding of the hydrocarbon potential of the regionally significant Nicaraguan Rise, strategic contacts were made with counterparts in the Caribbean regarding the sharing of technical data and exploration experiences. To this end, meetings were held with representatives of the Ministry of Energy and Mines in Nicaragua as well as the Ministry of Natural Resources and Environment (SERNA) in Honduras, both of which are responsible for hydrocarbon exploration in their respective countries. The PCJ is also seeking to develop a comprehensive technical evaluation of the offshore hydrocarbon basins of Jamaica in an effort to increase understanding of Jamaica's prospectivity with its strategic partners in Latin America. During the fiscal year additional income was earned from the licensing of seismic data through our service partners.

Regional Energy Ministers' Meeting

During the year, the Energy Ministers for the Community of Latin America and Caribbean States (CELAC) held its 2nd Meeting in Montego Bay Jamaica. At the meeting, the Declaration of Montego Bay and the Montego Bay Plan of Action on matters relating to regional energy security and integration was agreed.

Enhancing Capacity for Low Emission Development Strategy (EC-LEDS)

A memorandum of Understanding on EC-LEDS was signed between the governments of Jamaica and the United States of America. Stakeholder consultations were held on four draft deliverables under the Analysis and Investment for Low Emission Growth (AILEG) component of the EC-LEDS programme, namely: i) Climate Finance Flow Assessment; ii) Economic Modelling; iii) 2nd National Energy Policy Action Plan (2013-2016); and iv) Community Action Plan for Renewable Energy and Energy Conservation and Efficiency.

14 No other project has been approved since.

Transformation of the Rural Electrification Programme (REP)

The REP was renamed National Energy Solutions Limited (NESOL), rebranded with expanded functions and tasked with a new mission. The entity will be responsible for three main activities:

— developing renewable energy solutions for those households that are further than three kilometers from the grid

— working with the JPS to reduce electricity theft

— promoting energy efficiency and conservation – a continuation of work began by PCJ and will ensure that Jamaica maintains the gains achieved under the GOJ/IDB Public Sector Energy Efficiency and Conservation Programme.

The company will also provide project management services for the design and implementation of energy solutions for major housing initiatives by agencies of the state, especially where low-income earners are the targeted population. The Agency's achievements in 2013 included: a) the wiring of 423 houses; b) the electrification of several communities across five parishes; and c) the commencement of a Solar Energy Pilot Project for the installation of PV systems in rural communities.

Water Sector Bi-Annual Reports

The publication of bi-annual reports outlining activities in the water and sewerage sectors has been dogged by inconsistency in the supply and quality of data. In this regard, the OUR has been working with stakeholders (especially the small providers) to ensure that reports can be published, thereby giving a complete picture of the sector rather than just information for the major provider. It is expected that routine publishing of these reports will be resumed before the end of fiscal 2013/2014.

OUTLOOK

Growth is anticipated for the Electricity & Water Supply industry in 2014. This should emanate from expected increases in electricity consumption and water production. The expansion in electricity consumption will be boosted by higher demand from the Productive and Services industries. Correspondingly, electricity supply will be boosted by the planned commissioning of JPS' new Hydro plant at Maggoty, St. Elizabeth as well as the expected use of alternative energy sources. The Water supply sub-industry should be positively impacted by the continued implementation of several water projects across the island.

The expected increase in value added may, however, be stymied by the impact of higher international oil prices, as the pass-through effect would be harmful to the local industry. At the end of February 2014, the West Texas Intermediate, the market to which local oil prices are linked, recorded an increase of 3.3 per cent to US$100.82 per barrel in the relative to the end of December 2013. A continuation of this would lead an uptick in electricity prices, which would result in reduced demand and eventually contraction in the amount of electricity consumed. ■

CHAPTER 16

TRANSPORT, STORAGE & COMMUNICATION

INTRODUCTION

Growth in real value added of 0.2 per cent was recorded for the Transport, Storage & Communication industry during 2013 (Figure 16A). The higher real value added stemmed from growth in the Communication segment of the industry, driven mainly by competition in the telecommunications subcategory. Activities in this subcategory resulted in an increase in the number of call minutes sold, consequent on lower rates and heightened competition by service providers. Output in the Transport & Storage segment of the industry was reduced, reflecting the decline in activities at the islands seaports and the relatively flat performance in airport activities.

The weak performance in the Transport & Storage segment during 2013 compared with 2012 was reflected in the following indicators:

— the volume of domestic cargo handled at the island's ports declined by 2.4 per cent to 15 081 thousand tonnes

— ship calls to the island's ports went down by 2.6 per cent to 3 572

These were mitigated by increases of 0.4 per cent to 4 862 464 in passenger movements at the islands international airports and 6.5 per cent to 310 297 in the number of vehicles certified fit to operate on the island's roads.

At the end of June 2013, data for telecommunications showed increases of 3.0 per cent to approximately 2.8 million and 2.5 per cent to approximately 3.0 million, in mobile subscribers and total telephone subscribers, respectively, relative to December 2012. This resulted in a mobile penetration rate of 103.0 per cent and teledensity[1] of 112.1/100 population at the end of June 2013 compared with 108.2/100 population at the end of December 2012.

TRANSPORTATION

Policies and Programmes

The transportation segment of the Ministry of Transport, Works and Housing (MTW&H) continued to be guided by the National Transport Policy of 2007, which seeks, among other things, to:

— encourage greater privatization

— improve inter-agency co-ordination in inter-modal transport

— increase user contribution towards the cost of transport services

— facilitate access to subsidies for the provision of transport services to vulnerable groups

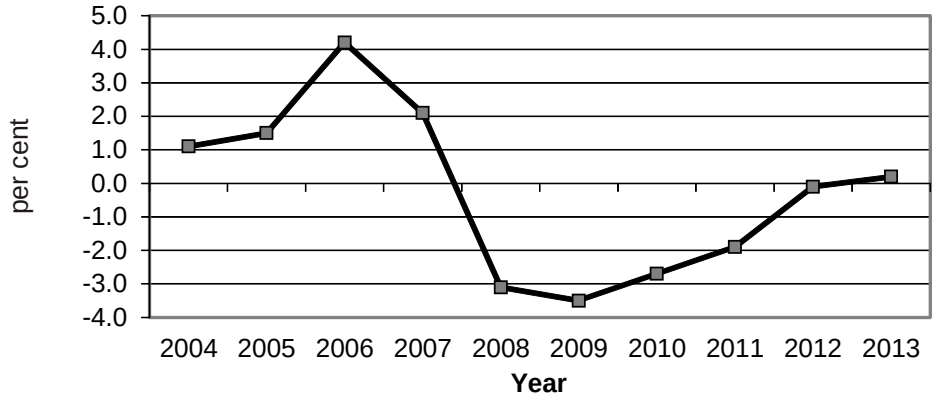

FIGURE 16A: REAL VALUE ADDED FOR TRANSPORT, STORAGE & COMMUNICATION

1 Teledensity refers to the total number of telephone lines (mobile and fixed) per 100 population.

— create policy awareness and further participation in policy development

— improve the integration of transport policy with land use and other policies

— expand access to reliable and efficient transport and related services in rural areas

— promote energy conservation and support the reduction in fuel importation.

The Ministry commenced preparatory activities in 2013 to foster the revision of the Policy, as well as to complete the accompanying National Transport Strategy (NTS) and National Transport Plan (NTP), that were to be developed to support the Policy.

Consistent with the objective of modernizing the Transport sector, the Ministry commenced the process of engaging a consultant to guide the establishment of the Land Transportation Authority (LTA), which will result from the merger of the Transport Authority, the Island Traffic Authority and the regulatory functions of the Jamaica Railway Corporation. The LTA will facilitate policy convergence with regard to the dispersion of the related and varying pieces of legislation.

Work on a Rights of Way Policy (ROW) was also started during the year. This Policy is being developed to facilitate adequate access to, and orderly use of, the public's rights-of-way along main and Parish Council roads throughout the country, while improving the coordination of utility companies in the use of rights-of-way.

During the year, the Transport Authority implemented a number of key initiatives borne out of the thrust to reform the public transportation sector through the use of standards setting and mirroring best practices. Consequently, the Authority continued to employ a combination of activities to monitor and enforce the regulations pertaining to public land transportation islandwide. These included major road operations, prosecutions, seizures and interagency collaboration with other enforcement entities. These strategies have contributed to the reduction of illegal operations and general misconduct in the public transportation sector. To facilitate the process, the enforcement arm of the Transport Authority was strengthened with the deployment Route Inspectors as well as District Constables with the powers of arrest. These human resource enhancement activities should serve to increase enforcement activities, effectiveness of the operations teams, and further increase safety, security and compliance of the public transportation sector.

A Rural School Bus transportation proposal was developed. The proposal covered the recommendations for implementing school transportation services using Clarendon as the pilot to test for the service. In addition, there was the completion of a Portmore School Bus Survey, which examined the operations of informal school bus operations. This led to the formalization and enhancement of the St. Catherine School Transportation Association, a school bus system that is now operating based on Transport Authority approved standards.

Infrastructure Development

The National Works Agency (NWA) expended approximately $7.7 billion on infrastructure and works relative to $15.1 billion in 2012. This expenditure facilitated infrastructure works on Jamaica Development Infrastructure Programme (JDIP); the Palisadoes Shoreline & Rehabilitation Works; Transportation Infrastructure & Rehabilitation project (TIRP); and Road Infrastructure Programme (RIP). In 2013, the National Road Operating & Construction Company (NROCC) expended $519.0 million[2], mainly on the North-South Link of Highway 2000, which will be constructed in three phases – Section 1: Caymanas to Linstead; Section 2: Linstead to Moneague; and Section 3: Moneague to Ocho Rios.

The Jamaica Development Infrastructure Programme (JDIP) – The works undertaken under JDIP comprised the rehabilitation of main, parochial, housing scheme and community/development roads. Also included were improvement in drainage, pavement, traffic management and protection works; construction of retaining walls, bridges and interchanges; and river training.

The North-South Link of Highway 2000 – a Concession Agreement was effected in January 2013 with the Jamaica North-South Highway Company Limited[3] (JNSHC), the developer of the proposed toll road. This facilitated the commencement of construction activities for all three sections of the North-South leg of Highway 2000. In accordance with the Concession Agreement, the project is slated to last for 36 months, with a completion date of January 2016.

— *Section 1: Caymanas to Linstead* – works commenced on this 27.5 kilometre (km) section in September 2013. To the end of March 2013, the developer has been provided with access to 70.0 per cent of the right of way for the construction of the Highway, which is in excess of that required by the Concession Agreement. The developer is currently carrying out earthworks in the right of way and has commenced the construction of bridges at Rio Cobre, and underpasses at Wakefield and Treadways. Work on this leg is slated for completion in January 2016.

— *Section 2: Linstead to Moneague (Mount Rosser Bypass)*[4] – the developer commenced work on this 19.5 km leg in February 2013 and has completed 61.0 per cent of the outstanding works by March 2014. Site clearance and reinforced concrete box culverts were completed. The work, which was at varying stages of completion are related to earthworks cut and fill; retaining walls; sheet pile walls; and slope protection and drainage. The works to the piling in the geotechnically-difficult areas are more than 90.0

2 This does not include the expenditure by the developer on the construction works.

3 The JNSHC, a special purpose company established by CHEC to undertake the development will be responsible for financing, design, construction and operation of the Highway for the concession period of 50 years. Being a Build Operate and Transfer (BOT) model, the Highway will be transferred to the Government of Jamaica at the end of the concession period.

4 Work on this section recommenced following stoppage due to geotechnical problems.

complete. A completion date of August 2014 is forecasted.

— *Section 3: Moneague to Ocho Rios* – the developer commenced work on this 20 km section in October 2013. At the end of March 2013, the developer has been provided with access to 72.0 per cent of the right of way for the construction of the Highway, which is in excess of that required under the Concession Agreement. Cleared access for equipment on this corridor was approximately 15.0 per cent complete. Construction of this section is scheduled to be completed by January 2016.

Transportation Infrastructure & Rehabilitation Project (TIRP) – activities under this project continued with several deliverables associated with the planned South Coast Highway Improvement Project. At the end of December 2013, work was 76.0 per cent complete. Work was far advanced on the draft Feasibility Study Report scheduled to be submitted by the end of January 2014, while the Master Drainage Plan was completed.

Road Infrastructure Programme – the main objective of the project is to enhance urban and suburban mobility and safety, improve accessibility, lower transport costs and reduce accident rates, through the improvement and maintenance of roads. All activities progressed as planned during the year and included: the installation of road safety equipment, traffic signs, safety works in Negril and Papine; the installation of pedestrian signals at – Hope Road/Standpipe Community, Lady Musgrave/Fairway, Lady Musgrave/Seaview Avenue, Mona Road/Wellington Drive – and the installation of crash barriers. Consistent with the road safety component of the project, several new road safety improvement activities were added to the programme. These included the Advance Warning System Equipment; Traffic Signal Interconnection; Road Safety Advertising; Road Safety Twinning Programme; Traffic Safety Monitoring System; and the IMSA Training to include Road Work Safety Training.

1. LAND TRANSPORT

Traffic Management/ Road Safety

The strategies utilized in the road transport sector comprised a combination of:

— Congestion Management, which entailed:

  – Preferential Treatment – given to some vehicles, specifically bus lanes on selected corridors, such as, along Washington Boulevard as well as temporary Jamaica Urban Transit Company (JUTC) lane assignments on Mandela Highway between Spanish Town and Six Miles

  – Public Transport Operations – where service improvements are facilitated through the use of premium express services, and the utilization of high capacity vehicles by the JUTC and Montego Bay Metro Limited for high passenger volumes especially during peak hours

  – Administrative measures – which was done in conjunction with the local authorities and the police and comprised car restricted zones.

— Public transport-oriented strategies, which encompassed service quality – reasonable cost, clean and comfortable environment, regular, reliable and predictable service, and parking control for on-street space and publicly operated car parks.

The traffic management strategies employed included the following:

— accident remedial measures – black spot treatment, skid resistant surfacing

— pedestrian crossing facilities

— priority bus lanes and bus stops

— provision of information– public education campaigns, road signage (directional, regulatory, warning) and road markings.

PERFORMANCE

The Island Traffic Authority examined a total of 390 369 vehicles for fitness and issued 310 297 certificates of fitness[5]. This compared with 390 200 vehicles examined and 291 310 certified fit to operate on the island's roads during 2012.

Weight Limit Enforcement Programme (WLEP)

Under the WLEP, the weighing of vehicles continued at the permanent weigh station at Harbour View as well as with the two mobile scales in operation on the South and North Coasts. The operations in Harbour View commenced in November 2012, while the mobile scale operations resumed in July 2013. For 2013, a total 3 147 vehicles were weighed (1 772 at Harbour View, 1 375 at the Mobile Stations). Of the total weighed, 962 were overweight and tickets issued to 705 for the violation.

Passenger Movement & Transit

Approximately 19 034 vehicles were licenced to provide public transport services. Collectively, these vehicles supplied 175 197 seats. Of the total seats, Route Taxis, Rural Stage Carriages and vehicles licenced to operate in the Kingston Metropolitan Transport region (KMTR) accounted for 42.6 per cent, 38.3 per cent and 18.5 per cent, respectively. The Montego Bay Metro bus service and Express Carriages each accounted for 0.3 per cent. The seating deficit across the island was estimated at 7 646.

A 25.0 per cent fare increase became effective on August 25, 2013 resulting in the following fare[6] changes for the various licence types:

— Rural Stage Carriage – the base fare was increased to $33.00 from $26.40 and the rate per kilometre (km) moved to $4.25 from $3.40

5 Disaggregation of data according to vehicle types was not available.

6 For Rural Stage Carriages, Route Taxis and Hackney Carriages the Fare is equal to the Base Fare plus the per kilometre fare (Fare = Base Rate + Per Kilometre Rate)

— Route Taxi – the base rate was increased to $82.50 from $66.00 and the rate per km was increased to $4.50 from $3.60

— Hackney Carriages – the base rate was increased to $234.38 from $187.50 and the per km rate moving to $46.88 from $37.50

— JUTC – The fare for JUTC buses and their Sub-Franchise buses increased to $100.00 from $80.00.

For Rural Stage Carriages, Route Taxis and Hackney Carriages the increased fare is equal to the Base Fare plus the per kilometre fare (Fare = Base Rate + Per Kilometre Rate). Children, Persons with disabilities and senior citizens pay half of an adult's fare. With respect to the JUTC, the fare for children, persons with disabilities and senior citizens increased to $20.00 from $15.00.

Public Buses

During the year, the JUTC operated on 90 regular and express routes, 23 premium routes, 3 special service routes for the physically-challenged within the Kingston Metropolitan Transport Region (KMTR), as well as charter services. The servicing of these routes was facilitated by average dispatch of 280 buses providing a seating capacity of 14 800. The JUTC continued to operate from three depots – Rockfort, Portmore and Spanish Town.

The Transport Authority is currently constructing a Transportation Centre in Linstead. When completed the Transportation Centre should result in improved transportation facilities for over 400 bus/taxi operators, reduced congestion in the township and provide greater accessibility to public transportation to residents of Linstead and surrounding communities such as Banbury, Bog Walk and Guys Hill. As it relates to other transportation centre across the island, the Transport Authority is working with the Ministry of Local Government and Parish Councils to establish standards for the design, operation and maintenance of these facilities.

The JUTC operated an average of 280 buses per month in the KMTR compared with an average of 293 per month in 2012. This out-turn reflected the fewer bus run-out recorded for the first three quarters of the year, when there were efforts to improve efficiency by dispatching buses according to requirement. The nine-month out-turn outweighed the 15. 5 per cent increase in the October–December 2013 quarter, when more buses became available, given the availability of parts for maintenance. The number of JUTC Passenger Trips fell by 5.9 per cent to 51 334 438. Fare Income, however, increased by approximately $14.0 million to $3 046.1 million. The growth in Fare Income was due mainly to the 25.0 per cent increase in bus fare and by improvement in revenue performance of the Express Service. Revenue from Charter Trips was $119.1 million compared with $101.2 million in 2012.

Approximately 26 102 new Smart Cards[7] were issued compared with 15 178 in 2012. Following the sluggish performance earlier in the year, the issuance of smart cards was bolstered during the October–December quarter, when a number of blank personalized cards (Smarter cards)[8] were issued to concession passengers. The issuance of Smart Cards has been falling due largely to the delay in the implementation of the new fare collection system, which should employ the use of the new Smarter Cards. The revenue from Smart Cards was $279.0 million compared with $428.4 million during 2012, representing 9.3 per cent of fare income relative to 14.3 per cent in 2012.

The provision of transport services by the JUTC was complemented by operators of JUTC sub-licencees; Rural Stage Carriage with routes terminating in the KMTR; and Express Carriage. Approximately 378 JUTC sub-licencees operated compared with 398 in 2012.

Licences - Public Passenger Services

A total of 24 084 applications[9] for licences were received by the island's Transport Authority compared with 21 726 during 2012. This occurred despite the planned cessation in the issuing of licences, as an additional number was facilitated. The growth stemmed from increased applications received for all the categories reported on, as follows:

— Route Taxi, 16 838 relative to 16 635

— Hackney Carriage, 1 580 relative to 789

TABLE 16.1
TAXI SERVICE: LICENCE ISSUED, 2009 - 2013

Licence Type	2009	2010	2011	2012	2013[p]	2012/2011	2013/2012
Route Taxi	14 373	12 483	15 063	12 735	13 093	-15.5	2.8
Hackney Carriage	1 490	1 484	1 651	914	1 530	-44.6	67.4
Contract Carriage	3 041	4 075	3 735	2 959	3 315	-20.8	12.0
Rural Stage Carriage	1 044	966	1 114	839	1 085	-24.7	29.3
TOTAL	19 948	19 008	21 563	17 447	19 023	-19.1	9.0

p - preliminary

Source: Transport Authority

7 The Smart Card is a cashless fare collection system launched in December 2002 for the Kingston Metropolitan Transport Region (KMTR).

8 These cards are not yet being used, but compulsory usage should be effected on April 1, 2014.

9 This total refers to the categories surveyed as indicated in Table 16.1. The figures for Public and Private Carriers are not included.

— Contract Carriage, 4 615 relative to 4 472

— Rural Stage Carriage, 1 051 relative to 990

Similarly, the number of licences issued for these categories grew to 19 023 from 17 447 in 2012 (Table 16.1). The higher numbers stemmed from increases in issuances to all the categories, and may be due to, in some cases, applicants unofficially switching from one category to another.

The Authority continued to effect improvements in the processing and delivery of licences to achieve an average turnaround time of two days in the off peak period and five days during the peak licensing period. Changes made to the procedure for licence renewal applications in February 2013, led to a significant reduction in the processing time for licences to 36 hours in the peak period from up to two weeks.

2. MARITIME TRANSPORTATION

During 2013, plans to position Jamaica as a major player in the global supply chain industry intensified. Consequently, the PAJ, along with other government Ministries, Departments and Agencies and other stakeholders were involved in several activities to achieve the objective of Jamaica becoming the fourth node in the global logistics chain – a Global Logistics Hub – in order to: a) benefit from increased business prospects which are expected to flow from the expansion of the Panama Canal, scheduled to open in June 2016, as well as, b) to take advantage of the opportunities to be derived from the shifts that are taking place within global trade and shipping. Therefore, in an effort to create an enabling environment to maximize the possible benefits of the Logistics Hub, government commenced work on the key components of the Strategic Plan in 2013.

With regard to the Maritime industry, activities and discussions were centred around the expansion and privatization of the maritime/shipping infrastructure; enhancements to the trade related infrastructure (ports); and the exploration of new investment opportunities and strategies for the growth of the industry. Consequently, various initiatives and projects were continued and new ones were commenced:

— ***Privatization of the Kingston Container Terminal (KCT)*** – of the five firms that submitted proposals to pre-qualify to participate in the KCT public-private partnership transaction, three – Port of Singapore International (PSA), Terminal Link Consortium (consisting of Terminal Link, CMA CGM China Merchant Holding International and China Harbour Engineering Company) and Dubai Ports (DP) World – achieved the scores required by the Request for Qualification and as such were recommended to proceed to the bidding stage of the transaction. These activities culminated in Cabinet's approval of recommendations of the KCT Enterprise Team[10] and the Port Authority of Jamaica (PAJ) for: i) the outcome of the pre-qualification process; ii) the structuring of the KCT Public-Private Partnership Transaction, based on the Due Diligence and Business Case Analysis submitted; and iii) proceeding to the Transaction Implementation Stage, that is, issuance of the Confidential Information Memorandum (CIM), the Request for Proposal (RFP), and a draft Concession Agreement. In addition, the studies for the dredging (Geotechnical Studies) which will determine the required scope of the dredging project and which will inform the technical and financial proposals for the bidders were concluded in January 2014.

— ***Development of a Port Community System (PCS)*** – activities for 2013 commenced with a competitive tender process for the selection of a suitable investment partner to finance, design, implement and operate a PCS in Jamaica. This followed the granting of approval to proceed with the establishment of the PCS through a public/private partnership arrangement. Stage 1 evaluation of bids was completed and Cabinet approved the issuance of the Stage 2 RFP along with the proposed transaction terms on December 16, 2013, to the two pre-qualified parties (Box 16.1). The PCS will enable real time access to information by industry players, including PAJ, customs, regulatory agencies and freight forwarders, thereby facilitating greater efficiency in the processing of shipments.

— ***Development of a Logistics/Transhipment Port in the Portland Bight Protected Area (PBPA)/ Goat Islands*** – talks regarding the development of a Logistic Port in the PBPA were advanced. During the year, an Environmental Management Scoping Study, commissioned by the PAJ was completed. This was to identify the legal and regulatory environment, the natural heritage resources, the industrial and commercial interest, as well as, the principal bio-physical and socio-cultural characteristics of the PBPA. The Scoping Study should also serve as a useful guide in determining the appropriate issues to be addressed in an Environmental Impact Assessment (EIA). Based on the findings of the Study, the PAJ continued its discussions with China Harbour Engineering Company Limited (CHEC) and subsequently arrived at an Initial Framework Agreement that provided the general terms and conditions under which further discussions would take place (see Box 16.1).

BOX 16.1
Recent Developments

Privatization of the KCT – The RFP and CIM were issued in mid-January 2014 and relevant data placed in a Virtual Data Room signalling the commencement of the Bidding stage of the Privatization process. The receipt of RFP is scheduled for May 2014 after which the evaluation, which is expected to take about two months, will be completed.

Development of a Port Community System (PCS) –The PAJ issued the Stage 2 RFP and CIM on January 3,

cont'd ➔

10 An Enterprise Team (ET) was appointed and established by way of a Cabinet Decision in December 2012 to provide oversight for the privatization process.

BOX 16.1 . . . cont'd

2014 and the response from bidders is expected by end of February 2014. Cabinet decision on permission to proceed with negotiation with the preferred bidder is anticipated by April 2014. Concurrently, the Draft Concession Agreement is being reviewed by GOJ and the Legal consultants contracted in January 2014.

Development of a Logistic/Trans-shipment Port in the Portland Bight Protected Area (PBPA)/ Goat Islands – CHEC, with assistance from PAJ, has applied to the National Environment & Planning Agency (NEPA) for a Beach Control License in order to begin their geotechnical investigation and the engineering survey which are necessary to determine the feasibility of the project. The technical feasibility study is expected to be completed by the end of April 2014, with the preliminary designs for the first phase of the project to begin immediately thereafter. These are expected to be completed by the end of June this year. On completion, an Environmental Impact Assessment (EIA) will be undertaken, prior to the submission of the project to Cabinet.

Privatization of the Norman Manley International Airport (NMIA) – The prequalification/shortlisting of bidders is expected by April 2014, RFP to be issued by June 2014 and the selection of concessionaire by September 2014.

PERFORMANCE

The number of ship calls to the island's ports was 3 572 compared with 3 666 during 2012 (Table 16.2). The fewer ship calls may be linked to the continued sluggishness in maritime activities and was reflected in the contraction recorded at the Port of Kingston (down 3.4 per cent to 2 581) as there were only two fewer ship calls at the Outports. The decline at the Port of Kingston was triggered by fall-off at the contributing ports – KCT, Kingston Wharves and the Private Wharves. In addition to the category Other Ports, which had 48 fewer ship calls, the decline at the Outports, was driven by fewer ship calls to:

— Montego Bay, down by 35 to 236

— Ocho Rios, down by 13 to 139

— Port Esquivel, down by 19 to 94

— Rocky Point, down by 3 to 76

These downturns outweighed higher number of calls to Falmouth, which had 21 more ship calls to reach 156. This increase was attributed to inaugural calls made by a number of cruise lines as well as increased calls from Royal Caribbean Cruise Lines.

A total of 15 081 thousand tonnes of domestic cargo were handled at All Ports, a fall-off of 2.4 per cent relative to 2012 (see Table 16.2). This out-turn represented two consecutive years of contraction and reflected the continued weakness in the global economic environment. The reduction in volume handled stemmed from declines of 11.4 per cent and 2.2 per cent at the ***Port of Kingston*** and ***Outports*** to 9 704 thousand tonnes and 10 411 thousand tonnes, respectively. The performance at the Port of Kingston was influenced by reduced activities at the Kingston Wharves (down 7.5 per cent to 612 427 tonnes), KCT (down 1.3 per cent to 905 849 tonnes) and the Private/Sufferance wharves (down 2.7 per cent to 3 152 130 tonnes). The volume of trans-shipment cargo was 7 343 thousand tonnes compared with 8 505 thousand tonnes and that of domestic cargo was 2 361 thousand tonnes relative to 2 452 thousand tonnes in 2012 (see Table 16.2).

The reduction in cargo volume handled at the Outports, relative to 2012, reflected, in the main, downturn in the quantity of bauxite/alumina handled at:

TABLE 16.2
PORTS: SHIP TRAFFIC & CARGO FLOW, 2009 - 2013

	2009	2010	2011	2012	2013[p]	% Change 2012/2011	% Change 2013/2012
KINGSTON							
No. of Vessel Visits	2 533	2 773	2 694	2 673	2 581	-0.8	-3.4
Volume of Cargo ('000 tonnes) [a]	13 703	15 057	16 864	10 957	9 704	-35.0	-11.4
- Domestic [a]	3 205	3 331	3 471	2 452	2 361	-29.4	-3.7
- Petroleum Product	2 499	2 380	2 172	2 367	2 309	9.0	-2.5
- Transhipment	10 498	11 726	13 393	8 505	7 343	-36.5	-13.7
OUTPORTS							
No. of Vessel Visits	864	862	927	993	991	7.1	-0.2
Volume of Cargo ('000 tonnes)	8 784	9 632	11 378	10 640	10 411	-6.5	-2.2
- Landed	2 616	2 491	2 730	2 591	2 563	-5.1	-1.1
- Loaded	6 168	7 141	8 648	8 049	7 848	-6.9	-2.5
TOTAL - ALL PORTS							
No. of Vessel Visits	3 397	3 635	3 621	3 666	3 572	1.2	-2.6
Volume of Domestic Cargo ('000 tonnes)	14 487	15 343	17 021	15 459	15 081	-9.2	-2.4
Volume of Total Cargo ('000 tonnes)	24 986	27 069	30 414	23 964	22 424	21.2	-6.4

a excludes petroleum products
p - preliminary

Source: Port Authority of Jamaica

— Port Rhoades at 5 664 thousand tonnes compared with 5 825 thousand tonnes

— Rocky Point, 1 242 thousand tonnes compared with 1 217 thousand tonnes

— Port Esquivel, down from 578 thousand tonnes to 546 thousand tonnes.

The out-turn at these ports reflected the impact of depressed conditions in the global alumina market as well as high fuel prices which increased operating costs at the bauxite/alumina plants. Reduced cargo volume was also recorded for Montego Bay, down 6.7 per cent to 643 thousand tonnes and Ocho Rios, down 29.0 per cent to 73.2 thousand tonnes. The lower volume of cargo handled at the Ocho Rios Pier was linked to contraction in sugar exports, brought about by a fall-off in sugar production.

The total volume of cargo handled at the island's ports, inclusive of petroleum products, was 22 424 thousand tonnes relative to 23 964 thousand tonnes in 2012. The out-turn was due to contractions in the volume of domestic and trans-shipment cargo, and petroleum products handled (see Table 16.2). The downturn in the volume of domestic and trans-shipment cargo handled reflected, in general, the continued sluggishness in the global economic environment, while that of petroleum products mirrored the conditions in the domestic economy

3. AIR TRANSPORTATION

Activities in the air transport segment were centred around the strategy to expand the domestic, international and air transport infrastructure and services. This became more critical with government's commitment to establish Jamaica as a Global Logistics Hub, thereby enabling the country to become an important part of the global value chain. Work to facilitate the projected expansion in the aviation industry included the continuation of construction works on the Control Towers at both the NMIA and Sangster International Airport (SIA), with an anticipated completion and operational date in 2014. The project is being managed and executed by the Jamaica Civil Aviation Authority (JCAA).

The NMIA benefitted from the completion of several planned projects. Among these were the development of the East Airfield, which included: an upgraded drainage infrastructure and additional warehouse for improved cargo operations; installation of an improved water conveyance system; and the installation of a new chilled water distribution system. Work on these projects continued under Phase 1B of the three-phased Capital Development Programme (1A, 1B and 2), scheduled to be completed in March 2017 at a cost of US$26.0 million. Work is still ongoing on Phase 2, while Phase 1A was completed in March 2012.

With regard to the privatization of the NMIA, the Draft Transaction Structure Report was submitted by the International Finance Corporation (IFC) to the Enterprise Team, the body appointed to provide oversight for the privatization[11]. Subsequently, recommendations for the Transaction Structure and Modalities were finalized and the Enterprise Team and the Airports Authority of Jamaica (AAJ) Board signed off on the transaction structure. A Cabinet submission seeking approval to proceed to the public tender process was being finalized (see Box 16.1).

At the SIA, the overlay of the existing runway was completed during the year at a cost of US$20.0 million. The project also included the upgrading of lighting along the runway surface and the addition of shoulders to reduce the incidence of standing water on the runway during rain. Consistent with plans to improve service delivery to its customers by expanding the commercial programme, a number of changes to the food and beverage programme were completed. A number of options for passengers as well as major international brands were introduced.

TABLE 16.3
INTERNATIONAL AIRPORTS: MOVEMENTS OF AIRCRAFT, PASSENGERS, CARGO AND MAIL, 2012 - 2013

	2012[r]				2013[p]				% Change	
	N.M.I.A	S.I.A	IFIA	TOTAL	N.M.I.A	S.I.A	IFIA	TOTAL	2012/2011	2013/2012
Arrivals	720 468	1 637 127	1 150	2 358 625	664 892	1 704 582	936	2 370 410	1.3	0.5
Departing	745 125	1 644 654	1 197	2 390 976	693 407	1 711 537	944	2 405 888	1.3	0.6
Intransit	11 319	99 704	0	111 023	14 570	71 596	0	86 166	10.0	-22.4
Total Passengers	1 476 792	3 381 485	2 347	4 860 624	1 372 869	3 487 715	1 880	4 862 464	1.4	0.0
Aircraft Movement	22 584	40 320	3 023	65 927	20 357	39 489	2 621	62 467	2.4	-5.2
Cargo (Kilograms)	9 952 433	5 365 619	0	15 318 052	9 684 947	5 566 949	0	15 251 896	3.4	-0.4
Mail (Kilograms)	2 368 817	343	0	2 369 160	1 818 319	695	0	1 819 014	-7.6	-23.2

r - revised
p - provisional

Source: Airports Authority of jamaica

11 The Development Bank of Jamaica (DBJ) which serves as the Secretariat and the International Finance Corporation (IFC) was appointed general consultants.

PERFORMANCE

During 2013, the air transport industry was impacted by a number of factors, including;

— the effects of adverse weather condition in the USA, such as the snow storm in February 2013, which temporarily halted aircraft movement in the north-eastern region

— ongoing challenges in Jamaica's principal markets of Europe and North America, including the economic downturn across the Euro-zone and the October 2013 US Government shutdown, which negatively impacted spending on air travel

— the new travel/tourism opportunities and initiatives in Latin America, which reported strong economic performance and a robust expansion of business related travel.

Total passenger movements[12] at the island's international airports was 4 862 464 compared with 4 860 624 (Table 16.3). The higher out-turn stemmed from growth in the main passenger categories – Arrivals and Departures – as passenger numbers for the Intransit category fell from 111 023 to 86 166. Passenger traffic for the Arrival and Departure categories increased by 0.5 per cent to 2 370 410 and 0.6 per cent to 2 405 888 passengers, respectively. The overall higher passenger movement was supported by the improvement in traffic volumes at the SIA, in contrast to the fall-off recorded at the NMIA and the IFIA.

Passenger traffic at the SIA expanded by 3.1 per cent to 3 487 715, reflecting a 4.1 per cent increase in both arriving and departing passengers to 1 704 582 and 1 711 537, respectively. The number of Intransit passengers fell from 99 704 to 71 596. The out-turn at the SIA was bolstered by:

— the addition of new flights by airlines, including Air Tran from the Southwest hub of Chicago and Candor Airline out of Munich, Germany

— the introduction of new services – Transaero out of Russia; Thomson Airlines from London-Gatwick hub; Copa Airlines out of Tocumen, Panama; Virgin Atlantic from London Gatwick; and Thomas Cook Scandinavian Airlines out of Stockholm, Sweden

— the resumption of service by Delta Airlines out of Indianapolis

— improvement in the load factors by some airlines, such as Thomson Airways, US Airways, Westjet and Sunwing

The increased numbers were also supported by the commencement during the October-December 2013 quarter of some non-stop seasonal flights – Frontier Airlines from its Colorado Hub; Air Berlin from Dusseldorf and Munich in Germany; and Travel Service from Prague. Further growth at the SIA was stymied by the unexpected cut in capacity by Transat, the cessation of flights by Air Jazz as well as discontinuation of service by the domestic shuttle – Jamaica Air Shuttle.

There was a decline of 7.0 per cent to 1 372 869 at the NMIA, due to fallout in the passenger categories – Arriving, which fell by 7.7 per cent to 664 892 and Departing, which dipped by 6.9 per cent to 693 407. The 28.7 per cent growth recorded by the Intransit category, which reflected the contribution, in the main, of Fly Jamaica with its John F Kennedy (JFK)–Kingston–Guyana and Guyana–Kingston–JFK routes, was insufficient to stem the overall reduction. Operations at the NMIA were affected by:

— a snowstorm, which impacted the North East coast of the USA in February

— the cessation of flights by Virgin Atlantic and British Airways

— the reduction in flight frequency by Caribbean Airlines (CAL) on a number of its major routes, starting in April 2013. For the July-September 2013 quarter, CAL, which accounts for 40.0 per cent of traffic at the NMIA, posted a 36.0 per cent decline in passengers

— reduced traffic by Jet Blue and Cayman Airways.

The effects of the foregoing outweighed the uptick which emanated from travel activities linked to the CARIFTA Games, the Inter-Secondary Schools Sports Association Boys and Girls Championships and the Football World Cup Qualifiers.

Approximately 1 880 passengers passed through the IFIA, 467 fewer than during 2012. This emanated from contraction in both the number of Arriving (down by 214 to 936) and Departing (down by 253 to 944) passengers.

Aerodromes

The movement of tourists, leisure and business passengers continued to be facilitated by the three domestic aerodromes. Passenger traffic, however, contracted to 10 733 compared with 21 593 during 2012. The reduction reflected reduced flows at all three aerodromes:

— Tinson Pen 3 701 relative to 13 643

— Negril 6 818 relative to 7 546

— Ken Jones 214 relative to 404.

STORAGE

The performance of the Storage and Warehousing sub-industry, a traditionally small segment of the Transport, Storage & Communication industry, generally reflected the levels of activity in the Goods Producing industry, particularly at the ports. However, given the expanded emphasis on logistics, warehousing and storage, which are critical pillars, were at the forefront of discussions in 2013. Data recorded by the PAJ showed a 2.5 per cent decline to 15 081 tonnes in the volume of domestic cargo handled at the island's sea ports. This, however, represented a deceleration in the rate of decline, given the 9.2 per cent fall-out recorded in 2012 (see Table 16.2). The out-turn for 2013 resulted from contraction in the volume of cargo handled at both the Port of Kingston and the Ouports. The fall-off in bauxite and alumina exports, consequent on developments in the global environment, stymied activities at Outports, while at the Port

12 This represents data supplied by the Airport Authority and includes crew members, which is not included in stopover arrivals data published by the Jamaica Tourist Board.

of Kingston the reduced volume stemmed from downturn in the amount of domestic cargo, trans-shipment cargo and petroleum product handled. With regard to the amount of warehousing space leased for storage by the Factories Corporation of Jamaica, there was a 23.6 per cent rise to 345 205.4 square metres . Additionally, the lease rates per year increased to between $2 869.20 and $3 463.20 from between $2 205.84 and $4 008.60 per square metre.

COMMUNICATION

Policy Framework

Government continued its work in implementing critical areas of the Information and Communication Technology (ICT) Policy. In this regard, activities in 2013 focussed on creating frameworks for:

— the promulgation of legislation to facilitate the convergence of telecommunications, broadcasting and ICT. In this regard, steps were taken to strengthen the legislative and regulatory framework for the ICT sector in the following areas:

- Data Protection – stakeholder sensitization workshops were conducted and drafting instructions developed for a Data Protection Bill. This Bill makes provision for the protection of the privacy of personal data and establishes a regulatory framework for the collection, processing, storage, use and disclosure of this data
- Cybercrimes – in keeping with the requirements of the legislation, the Cybercrimes Act was reviewed by a Joint Select Committee of Parliament (JSCP). The aim was to ensure that the legislation was in keeping with international best practices and provided effective sanctions for emerging types of cybercrime. The recommendations proposed by the JSCP were approved by Parliament and will inform drafting instructions to amend the Act.
- Telecommunications Act – a consultant was engaged under the HIPCAR Project to develop drafting instructions in the area of licensing, access and interconnection. These instructions along with the instructions to be developed for the ICT single regulator will be utilised to develop a new ICT Act.

— the establishment of a single ICT Regulator. With the support of the Inter-American Development Bank (IDB), the Government commenced the process to procure the services of a consultant to: i) review the current administrative and regulatory framework and governance model for the ICT industry; and ii) provide specific recommendations for drafting appropriate strategic legislation for the establishment of a converged stand-alone ICT regulator. The need for a single regulator was occasioned by developments in the industry that made traditional regulatory frameworks inadequate and as such, a modern and robust regulatory framework with a single point of entry into the sub-industry became critical.

— the introduction of number portability. The Government commenced activities for the creation of a framework for the implementation of fixed to fixed and mobile to mobile number portability. An Informal Number Portability Working Group (INPWG) was established in January 2013 with membership from the Ministry of Science, Technology, Energy & Mining (MSTEM), Office of Utility Regulation (OUR), and key stakeholders (including Digicel, LIME and Flow)[13].

NEW INVESTMENTS IN INDUSTRY

Seven companies – ADV Communications Ja. Ltd; Medullan; Healthcare Eq. Caribbean Ltd; Portmore Pines (ICT Commercial Development); Elephant Group; Sutherland Global Services; and Barnett Tech Park Expansion – invested in the Business Process Outsourcing (BPO) segment of the industry, creating in excess of 1 500 jobs. On completion, these companies are expected to invest approximately US$155.0 million. Highlights of these investments included:

— the inauguration of Sutherland Global Services' BPO operation in Jamaica. The operation located on the University of the West Indies (UWI) Mona campus uses a unique 'earn where you learn' model, thereby enabling the company to access a workforce. Students on campus are able to gain work experience while earning

— ground-breaking for the second Barnett Technology Park project which, on completion, is expected to create 50 000 sq. ft. of building space for lease to operators within ICT/BPO industry.

TABLE 16.4
NUMBER OF TELECOM LICENCE GRANTED, 2009 - 2013

Licence Type	2009	2010	2011	2012	2013
Service Provider	3	9	2	1	9
Carrier	2	6	1	1	6
Total Issued	5	15	3	2	15

Source: Information and Communication Technology Division - MSTEM

13 In 2014 the OUR is expected to invite applications for a service provider to operate a number portability central reference database and the automated order handling process. For more information see section on "Utility Regulation".

This is expected to provide much needed space for expansions within the industry

PERFORMANCE

Fifteen telecommunications licences were issued, nine to the Service Provider category and six to the Carrier category[14], compared with one in each category in 2012 (Table 16.4). These brought the number of licence issued since liberalization of the industry in 2000 to 478. The number of licence renewed amounted to 9 relative to 11 during 2012.

At the end June 2013, there were 3 043 552 telephone subscribers compared with 2 968 081 as at December 2012. This resulted in teledensity of 112.1/100 relative to 108.2/100 at the end of June 2012. The number of mobile users increased by 3.0 per cent to 2 795 673, resulting in a mobile penetration rate of 103.0 per cent, an indication that some subscribers have more than one account with one or more provider.

The number of fixed lines declined by 2.1 per cent to 247 879 and marked a slowing in the contraction being observed over several years. Both Residential and Business lines recorded declines, with the Residential posting the sharper fall-off of 3 457 lines compared with 172 459 (see Table 16.5). The overall downturn continued to reflect global trends for fixed line telephone.

Performance in the telecommunications sub-industry was underpinned by, among other things, developments related to interconnection charges. Following the June 30, 2013 expiration of the interim mobile interconnection rates, introduced by the Office of Utility Regulation (OUR), in keeping with the enhanced powers granted in the 2012 amendments to the Telecommunications Act, the OUR introduced a new mobile termination rate (MTR). This was set at $1.10 cents per minute and will remain in effect for the next five years. The new rate represented a further reduction in call rates from $5.00 to $2.89 and $2.99 per minute for the two most dominant providers.

Community Access Points (CAPs)

Since its inception in 2012, the Universal Service Fund (USF) has established 168 Community Access Points and implemented an island-wide broadband network. This network, has significantly advanced high speed internet connectivity to high schools and, select public libraries, post offices and health facilities (Hospitals, Health Centres and Regional Offices). In addition to the foregoing, as at the end of 2013, a total of 364 access sites have been commissioned into service comprising 202 educational institutions, 40 libraries, 65 post offices and 57 Ministry of Health facilities across the island. Further, the Universal Service Fund has provided funding to the UWI, Mona to upgrade its 10 Open Campuses islandwide and to deploy a campus wide WiFi network at its main campus. It has also provided funding to the Caribbean Maritime Institute to replace critical infrastructure and equipment, and to the Jamaica Library Service to provide additional computers at its parish and branch libraries. In keeping with the 2012 amendments to

TABLE 16.5
TELEPHONE SUBSCRIBERS by CATEGORIES 2009 - 2013
NUMBER OF LINES

Categories	2009[r]	2010[r]	2011[r]	2012[r]	2013[p]	2012/2011	2013/2012
Fixed Lines	302 451	284 285	270 068	253 143	247 879	-6.3	-2.1
Residential	214 652	203 323	191 099	175 916	172 459	-7.9	-2.0
Business	87 799	80 962	78 969	77 227	75 420	-2.2	-2.3
Mobile Lines	2 956 061	3 181 995	2 945 395	2 714 938	2 795 673	-7.8	3.0
Pre-Paid	2 858 051	3 048 967	2 825 687	2 563 634	2 644 589	-9.3	3.2
Post-Paid	98 010	133 028	119 708	151 304	151 084	26.4	-0.1
Total Telephone Subscibers	3 258 512	3 466 280	3 215 463	2 968 081	3 043 552	-7.7	2.5
Teledensity	119.0	126.9	118.9	108.2	112.1	-9.0	3.6
Internet	114 539	118 187	119 423	124 168	920 206	4.0	641.1
Narrowband	2 216	1 421	1 154	1 122	989	-2.8	-11.9
Broadband	112 323	116 766	118 269	123 046	132 537	4.0	7.7
Mobile Broadband	n/a	n/a	n/a	n/a	786 680	-	-

Note: Data on Mobile Broadband reported for the first time
n/a - not available
r - revised
p - preliminary data at the end of June 2013

Source: Office of Utilities Regulation

14 Beginning in 2009, licences were issued under two categories compared with several categories in prior years. For licences issued under several categories prior to 2009, see ESSJ 2009.

the Telecommunications Act, the USF also provided funding to the National Library to digitize and web-enable its invaluable archival material.

Post and Telecommunications Department (PTD)

The PTD handled approximately 54.8 million pieces of mail, 8.4 per cent less than during 2012. The decline was due to less volume of mail handled in the heavily-weighted Letters category, down 8.4 per cent to 54.6 million pieces. This outweighed the upturn in the categories Parcels, up 19.0 per cent to 100 000 pieces and Others, up 17.4 per cent to 108 000 pieces (Table 16.6). The overall decrease was indicative of the continued shift from traditional mail to electronic communication, due to developments in the ICT sub-industry. The growth in the Parcels category resulted from increased exports to Cuba, which saw an upward movement of 1 321 Parcels to 27 811 in 2013.

The Department's revenue grew by 19.7 per cent to $1 583 million and expenditure by 11.8 per cent to $1 918 million. This translated to a deficit of $335.00 million, an improvement relative to the $393.0 million reported in 2012 (see Table 16.6).

The PTD, while exploring new areas in which to expand, continued to focus on improving their quality of service standards. With regard to expansion, the Department started to pursue a Counter Automation Project, which will provide a one-stop shop service to customers. On implementation, customers will be able to conduct different business at one counter. The Department introduced a new Bill Payment option for its customers and as such staff was trained in the operations of Bill Express. In addition, there is ongoing revamping of a next-day domestic delivery postal product called Zip Mail and islandwide training was delivered in preparation for the re-launch of this product in additional post offices islandwide.

UTILITY REGULATION

The imperatives of the telecommunication sub-industry continue to be:

— the deployment of broadband and promoting access for the benefit of all citizens, including those with disabilities

— the strengthening of competition in the various markets

— the facilitation of the use of an efficient numbering system

— the development of efficient cross network connectivity

— the enhancement of competition by way of efficient pricing

— the reduction in the time-loss and expenses of resolving disputes.

The OUR, consistent with related imperatives completed work on:

— the development of a **Long Run Incremental Cost Model (LRIC)** to allow for the determination of Mobile Termination Rates (MTR). This Determination was issued on May 30, 2013. The work, a consultative process involved the determination of cost oriented termination rates for the mobile industry as mandated by the Telecommunications Act. The termination rate should facilitate vibrant competition in the industry[15].

— the **Assessment of Reference Interconnection Offer (RIO 6) of LIME** with the issuing a Final Determination in September 2013 with an effective date of October 1, 2013. This followed the review of an application for Reconsideration of an earlier Determination issued on December 24, 2012. Work in this area was prompted by LIME's submission of its draft RIO-6 for assessment on May 28, 2009. The RIO-6 sets out the terms and conditions upon which persons who are licensed to operate a domestic telecommunications net-

TABLE 16.6
POST and TELECOMMUNICATIONS DEPARTMENT OPERATING AND FINANCIAL DATA 2009 - 2013

	2009	2010	2011	2012	2013[p]	2012/2011	2013/2012
Volume of Mail handled ('000)	74 052	67 260	66 000	59 851	54 832	-9.3	-8.4
Letters (Including Registered)	73 855	67 060	65 958	59 655	54 624	-9.6	-8.4
Parcels	92	86	93	84	100	-9.7	19.0
Others	104	113	120	92	108	-23.3	17.4
Finances ($M)							
Revenues	1 004	1 357	1 565	1 322	1 583	-15.5	19.7
Expenditures	1 712	1 721	1 808	1 715	1 918	-5.1	11.8
Surplus (Deficits)	-708	-364	-243	-393	-335	61.7	-14.8

p - provisional

Source: Post and Telecommunications Department

15 Lower mobile termination rates will intensify competition as smaller operators will pay lower termination charges and thus be able to reduce retail prices and thereby create greater value for consumers.

work in Jamaica may interconnect with the public switched telephone network of Cable & Wireless Jamaica Limited.

During the year, work also continued on the **Regime for Short Code** and **Number Portability (NP)**. The former is a project to develop and implement a numbering scheme using numbers which are shorter than the regular telephone numbers, for the provisioning of a broad range of existing and future services via text messaging. It is anticipated that a decision will be issued by March 2014. With regard to the latter, the OUR, during the year provided support to the Ministry. This was done through a stakeholder working group established to propose rules and address solution, procurement and implementation issues for number portability. The OUR is also represented on the three sub-committees (Business & Commercial, Legal & Regulatory, and Technical) impanelled by the working group. Work is in progress on the development of the NP Business Rules, NP technical specifications and the RFP for the provision of an NP Order Handling System & Central Reference Database under the licence.

OUTLOOK

The Transport, Storage & Communication industry is expected to grow during 2014. The higher real value added is predicated on expansion in both the Transport & Storage and Communications segment of the industry. Growth in the former will be based on increased activities at the island sea and air ports – given the anticipated expansion in stopover arrivals and higher bauxite and alumina exports. The performance in this segment of the industry must be viewed against the background of reduced value added during 2013. The positive out-turn expected in Communication will be driven by continued expansion in telecommunication activities due to competition. Additionally, the industry should be further boosted by continuation of some major infrastructure projects, such as the North-South link of Highway 2000, the coming on stream of Major Infrastructure Development Programme (see chapter on Official Development Assistance), as well as a more intense implementation of programmes linked to the Growth Inducement Strategy[16]. ■

16 Growth Inducement Strategy is a complementary document to the Vision 2030 Jamaica – National Development Plan and outlines strategies to facilitate growth in the Jamaican economy in the short- to medium- term.

CHAPTER 17

TOURISM

INTRODUCTION

The United Nations World Tourism Organization (UNWTO) estimated that global tourist arrivals increased during 2013. Regionally, the Caribbean Tourism Organization (CTO) reported growth in tourist arrivals for most countries. Locally, the Ministry of Tourism and Entertainment (MTE) continued to develop and implement policy initiatives and programmes aimed at enhancing growth within the sector. The policy initiatives and programmes were focused on strengthening the linkages between Tourism and other sectors as well as facilitating increased investments and visitor arrivals. Against this background, real value added for the Hotels & Restaurants[1] industry grew by an estimated 0.9 per cent (Figure 17A) and contributed 0.1 per cent to growth in Gross Domestic Product (GDP) during 2013. This was due to increased stopover arrivals. The increase in stopover arrivals reflected mainly more visitors from the United States of America (USA) and Europe. The improved performance from two of Jamaica's main source markets was the result of the recovery from the negative impact of Super Storm Sandy on visitors from the USA during 2012; and the introduction of flights from the Czech Republic and Russia. In contrast, cruise passenger arrivals fell in 2013, stemming from fewer visitors to the ports of Montego Bay and Ocho Rios.

POLICIES & PROGRAMMES

The policies, programmes and projects of the Tourism sector continued to be guided by the Vision 2030 – Jamaica National Development Plan; Medium Term Socio-Economic Policy Framework (2012–2015); and the Master Plan for Sustainable Tourism Development (Tourism Master Plan). The major strategic priorities were:

- maintaining and increasing market share (sustaining/increasing visitor arrivals and airlift capacity; improving and diversifying the tourism product; and enhancing the visitor experience)
- deepening tourism linkages with the other industries of the economy
- integration of tourism into community development
- increasing investments and developing transformational projects
- development of support structures to strengthen the product offerings in the sector
- facilitating and sustaining environmental management.

STATUS OF MAJOR POLICIES AND PROGRAMMES

Pension Scheme for Tourism Workers

The MTE, in collaboration with the Jamaica Hotel & Tourist Association (JHTA) and Tourism Enhancement Fund (TEF), continued to support the access of all tourism workers to pension benefits through the development of the *Pension for Tourism Workers Policy*, which was developed in 2012.

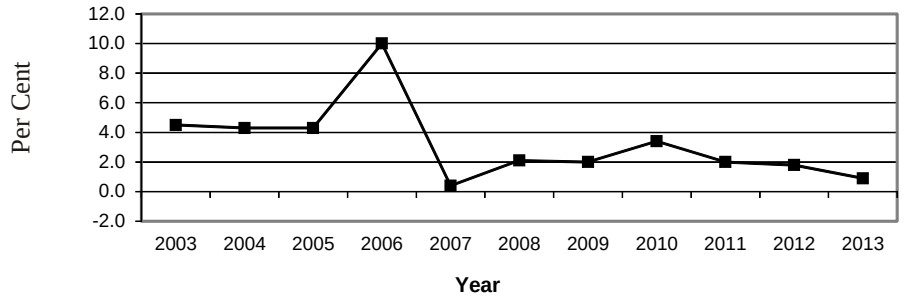

FIGURE 17A: PERCENTAGE CHANGE IN REAL VALUE ADDED FOR HOTELS & RESTAURANTS, 2003–2013

1 This industry captures most of tourism's direct contribution to real value added.

This policy seeks to promote awareness among employers and workers of the benefits of pension and retirement planning. During 2013, the draft plan was completed and reviewed by key stakeholders.

Community Based Tourism (CBT) Policy

The CBT policy (draft) is an important deliverable under the Rural Economic Development Initiative project. The policy is intended to facilitate community groups to establish entrepreneurial initiatives, diversify the tourism product and improve the standard of living within these communities. The draft policy is now at the Green Paper stage and stakeholders' consultations are scheduled for the first quarter of 2014.

Health and Wellness Tourism

The MTE, in collaboration with the Jamaica Promotions Corporation (JAMPRO) and the Ministry of Health, continued to provide oversight and guidance on the development of a Health and Wellness Tourism strategy. In August 2013, Cabinet approved the development of a Roadmap Strategy. The preparation of the draft document is being coordinated by JAMPRO.

Art, Craft and Souvenir Concept Paper

The Ministry developed an *Art, Craft and Souvenir Policy Concept Paper* in 2013 in its effort to standardise this sub-industry. Several stakeholder consultations provided input into the development of this document. The purpose of this paper is to promote greater awareness of locally-produced items; encourage innovation; improve packaging; implement regulation; create production and distribution facilities; and strengthen linkages within the economy.

Study of the Economic Impact of the Tourism Sector

This study was completed during 2013 and its intention is to provide detailed analysis of the sector as well as improve information for policy and planning. The study examined the impact of tourism on a number of areas such as employment, investment, output and foreign exchange.

Policy on the Management of Water Based Activities

The Ministry developed an options paper: *Towards the Development of a Policy on Water Based Activities In Marine And Riverine Recreational Areas*. The primary aim of the policy is to sustain a viable, safe and productive watersports sector. This policy is to be completed by the end of 2014. A Memorandum of Understanding was signed by the MTE, the Ministry of National Security and the Tourism Product Development Company Limited (TPDCo), which allowed amendments to watersports regulations during 2013.

The Multi-Hazard Contingency Programme

Since 2006, the Ministry of Tourism and Entertainment has put in place an emergency management framework that is linked to the national mechanism for the management of emergencies and disasters, which is coordinated by the Office of Disaster Preparedness and Emergency Management (ODPEM). The programme is managed through the Tourism Emergency Management Committee (TEMC) and coordinates with ODPEM and the National Disaster Committee to develop comprehensive disaster risk reduction strategies, which are applicable to the tourism sector. The TEMC ensures that strategic and proactive planning for and management of emergencies and natural disasters become a regular part of business operations. The programme helps tourism entities such as hotels, villas and guesthouses to develop comprehensive disaster preparedness and emergency plans. Capacity building and training is one of the main elements of the programme which addressed areas such as damage assessment, emergency operations and emergency planning.

Tourism Linkages with Other Sectors

In an effort to achieve a higher degree of integration and increase the impact of tourism on the economy, the MTE focused on strategies to strengthen the local value chain with agriculture, manufacturing, entertainment and sport. In 2013, a Tourism Linkages Hub within the Ministry was established and achieved the following:

- establishment of a Tourism Linkages Council, which was set up to provide guidance and oversight
- creation of a Tourism Linkages Task Force which comprised representatives from key government bodies and the private sector
- establishment of three Technical Working Groups, namely, Manufacture, Agriculture and Entertainment
- preliminary assessment of hoteliers' needs as well as the conducting of a more detailed study on the demands of the sector
- development of an online tool for use by suppliers and buyers, which provides a common area for buyers to identify needs and suppliers to meet those needs
- participation in the Global Trade Exchange Symposium/Agro-Business Networking session at Denbigh Agricultural Show 2013
- establishment of three Technical Working Groups, namely, Manufacture, Agriculture and Entertainment
- launch of the inaugural Agro-Tourism Farmers' Markets in Negril in collaboration with several stakeholders, namely, the Rural Agricultural Development Authority, the Ministry of Agriculture & Fisheries, the JHTA, the Jamaica Manufacturers' Association Limited and the Jamaica Business Development Corporation; four Agro-Tourism Farmers Markets were hosted with plans for markets to be held in other resort areas during 2014.

TOURISM LEGISLATIVE PROGRAMME

Timeshare Legislation

The implementation of legislation governing timeshare vacations in Jamaica is at an advanced stage. Work continued on the draft Bill and it is anticipated that it will be passed in the financial year 2013/14.

Omnibus Tax Incentive Regime

In preparation for the implementation of the government's Omnibus Tax Incentive regime (which will become effective January 1, 2014), the MTE took part in a number of consultations with the Incentive Working Group Committee,

Jamaica Customs, the JHTA and the Association of Jamaica Attractions Limited. The consultations were geared towards the revision of schedules and the administration and monitoring of procedures for the Tourism sector under the new incentives regime.

INCENTIVES

For 2013, the following incentives were granted to the accommodation and ground transportation sectors:

— **Hotel and Resort Cottages Incentives:** A total of nine hotels were granted benefits under the Hotel Incentives Act, three of which represented new properties while the remaining six represented properties that have undergone changes with respect to new ownership and structural alterations. Projected capital investment for 2013 was $32.8 billion with expected employment of 1 893 persons.

— **Tourism Ground Transportation Sub-Sector:** Approximately 295 motor vehicles were recommended for concession to car rental operators and 43 motor vehicles to contract carriage/ tour operators within the sector. During 2012, approximately 397 motor vehicles were recommended for concession to car rental operators.

TEF

During 2013, the TEF supported a variety of projects across Jamaica which had an impact on the development and attractiveness of resorts and towns. Support was provided in the form of the sponsorship of landscape upgrading; environmental maintenance projects; restoration of heritage sites; training for tourism workers; and funding for some major transformational projects. The transformational projects focused on the upgrading of the: (i) Ocho Rios Turtle River Development; (ii) Falmouth Hampden Wharf and Streetscape; (iii) Negril Entrance Way and Sea Park and Dual Walkway project; and (iv) the Montego Bay Elegant Corridor Lighting.

Other major projects that were approved for funding by the TEF included the: upgrading of the birthplaces of select national heroes and former Prime Ministers as well as the National Heroes Park; Small Accommodations Energy programme; Marine Resource Upgrade programme; renovations of the Montego Bay Civic Centre and Devon House; restoration of the craft village in Port Antonio; installation of Closed Circuit Television in Ocho Rios; rehabilitation of the Donald Buchanan Sport Centre; installation of lights at Sabina Park; and construction of a kitchen at the University of the West Indies to facilitate the Caribbean Culinary Management Course.

The Tourism Improvement Programme (TIP) is aimed at improving the tourism product in resort areas and provided short-term employment through labour intensive programmes and projects. Phase 1 of the TIP ended in March 2013 and accounted for disbursements of $140.7 million and employment of 1 897 persons. Phase two commenced in July 2013 and is expected to be completed by March 2014. Approximately $396.0 million was disbursed and 3 152 persons have been employed to date. Phase three was implemented during November 2013 and 1 632 persons have been employed with disbursements of $148.9 million.

Another key element of the TEF is the Summer Intern Programme (SIP). The SIP continued to train and mentor youth with a view to creating high performance leaders for the future. The programme, which started five years ago, aims to develop a good work ethic among the youth with primary focus on customer service and teamwork while providing financial independence. The programme, through its mentorship-partner arrangements, allows interns to be deployed across the island. In 2013, a total of 366 interns were placed in jobs in 90 organisations. Of the 366 interns who were placed, 179 were at the tertiary level and 170 at the secondary level.

The TEF revolving loan facility[2] is administered by Jamaica National Small Business Loans (JNSBL), which targets those individuals and companies which provide services to tourism. This is consistent with the objectives of the Tourism Enhancement Act. Total loans as at December 2013 were valued at $354.0 million, with 145 clients benefitting.

MARKETING & PROMOTION

The Jamaica Tourist Board (JTB), through its marketing activities, maintained and reinforced a positive image of Jamaica in the various targeted markets. This occurred against the background of budgeted estimates of expenditure of US$17.5 million and US$15.4 million for FY 2013/14 and FY 2012/13, respectively. Advertising continued to be a major pillar for attracting visitors. The traditional channels of television, radio, and print continued to play the main role. However, the use of internet technology increased significantly (eg. online display banners). Other forms of advertising such as: taxi tops, outdoor and sides of buses were utilised. The 'Jamaica Once you go, you know' campaign continued to inform the destination messaging across all media genres for 2013. The JTB created a new advertising campaign "Get All Right", which was launched on October 21, 2013. The new campaign message was utilised in advertisements for electronic, print and digital media, especially in the travel trade.

Other marketing and promotional activities undertaken by the JTB included:

— **Consumer & Trade Shows:** The JTB was actively involved in several targeted events including International Tourism Bourse (ITB) Berlin, Caribbean Travel Marketplace, World Travel Market, International Tourism Market Exchange (ITME), Worldwide Exhibition for Incentive Travel, Meetings and Events (IMEX) and other trade shows. Locally, the JTB continued to assist in coordinating the Jamaica Product Exchange (JAPEX), the island's premier travel trade show. JAPEX is held in conjunction with the JHTA.

— **Workshop/Product Training/Updates:** Several training programmes and updates were conducted in overseas markets. There were training and seminars for new travel agents and tour operators as well as

2 The initial agreement stipulated a maximum loan amount of $3.0 million with repayment over a period of three years. As of February 2011, the TEF/JNSBL agreed to extend the loan programme with individuals and companies now having access to a maximum of $5.0 million, a maximum repayment period of five years and 5.0 per cent interest rate per annum on the reducing balance.

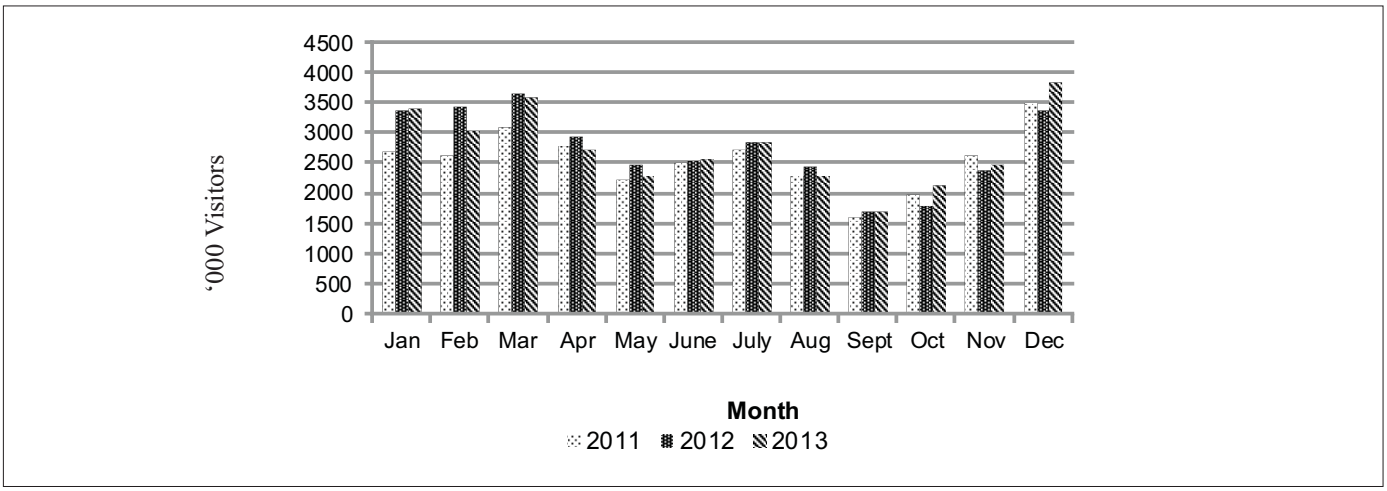

FIGURE 17B: TOTAL VISITOR ARRIVALS BY MONTH, 2011–2013

updates on the latest Jamaican products for business interests within the sector.

— **Familiarisation Tours:** The JTB sponsored several familiarization tours with representatives from the USA, Canada, the United Kingdom (UK) and Europe (Russia, Czech Republic), which educated travel agents on the Jamaican tourism product.

— **Special Projects:** These included the supervision of local students in the Global Travel & Tourism Partnership research project, essay and photo competitions and the monitoring of Tourism Action Clubs in 75 schools.

— **Website Development:** The JTB focused on revamping the www.visitjamaica.com website to encompass the images of the "Get All Right" campaign. The website continued expanding its web-based marketing campaign through social networking and internet media channels including Twitter, Facebook, YouTube, Island Buzz (destination blog site), and Pinterest.

— **Emerging Market Activities:** Participation at major travel events in targeted markets of Latin America, Continental Europe, Russia, China and India continued during 2013 in an effort to boost arrivals.

— **Destination Enhancement:** Approximately 224 journalists were hosted from all major source markets as well as the emerging markets of Latin America, Russia, and India. Events facilitated through sponsorship or endorsement were: Rebel Salute, Jamaica Jazz & Blues Festival, Jamaica Carnival, Jamaica All-Island Grill Off, Portland Jerk Festival, Port Antonio International Marlin Tournament, Reggae Sumfest, Reggae Marathon and Jamaica Pro Am Golf Tournament.

— **Domestic Tourism:** In keeping with the Tourism Master Plan's Strategic Vision for "an inclusive industry", programmes were implemented to stimulate interest and engender support for the sector. The programmes comprised The Experience Jamaica Campaign, Jamaicans at Home and in the Diaspora – Visiting Friends and Relatives, Tourism Awareness in Schools & Communities and Media Relations.

TOURISM TRAINING

For April to December 2013, the TPDCo delivered a total of 112 Team Jamaica programmes to 2 394 registered participants. Of this total, 2 219 participants were certified. There were 53 skills upgrading programmes that were delivered to 1 582 registered participants by TPDCo during April to December

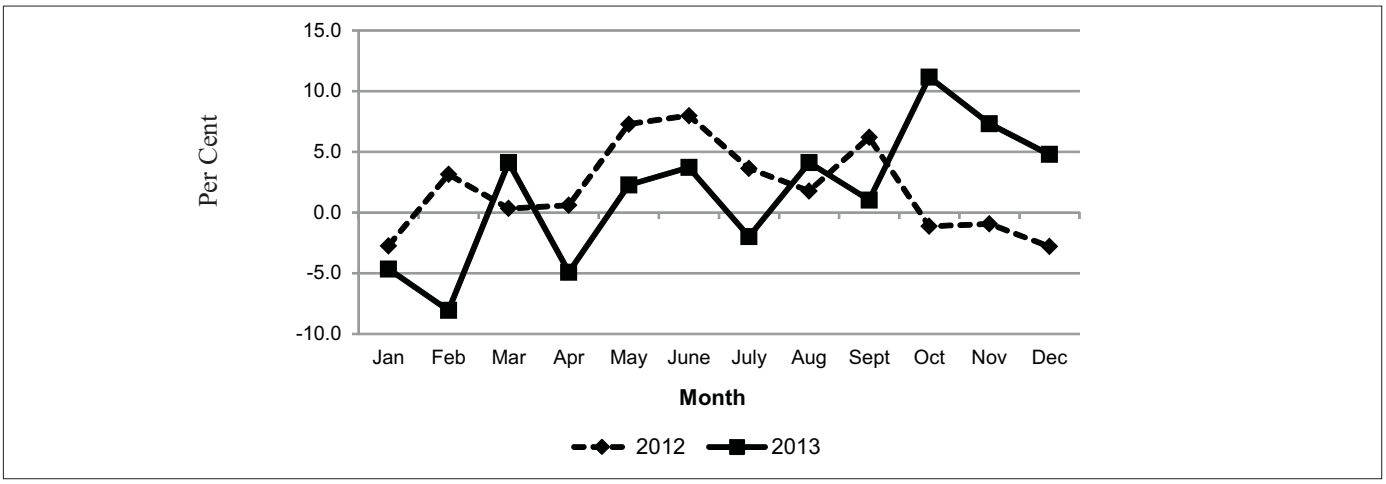

FIGURE 17C: PERCENTAGE CHANGE IN STOPOVER ARRIVALS BY MONTH, 2012–2013

TABLE 17.1
TOURISM PERFORMANCE INDICATORS, 2009–2013

INDICATORS	2009	2010	2011	2012[r]	2013[p]	% Change 2012 2011	% Change 2013 2012
Foreign Nationals	1 683 846	1 768 810	1 800 280	1 832 329	1 860 935	1.8	1.6
Non-Resident Jamaicans	147 251	152 868	151 472	153 756	147 474	1.5	-4.1
STOPOVER ARRIVALS	1 831 097	1 921 678	1 951 752	1 986 085	2 008 409	1.8	1.1
Cruise Passengers	922 349	909 619	1 125 481	1 320 083	1 265 268	17.3	-4.2
TOTAL VISITOR ARRIVALS	2 753 446	2 831 297	3 077 233	3 306 168	3 273 677	7.4	-1.0
Average Length of Stay for Foreign Nationals (Nights)a	9.2	9.0	8.9	8.8	8.7	-1.1	-1.1
Total Foreign Exchange Earnings (US$M)	1 925.4	2 001.2	2 008.4	2 069.6	2 077.1	3.0	0.4
Stopover Foreign Exchange Earnings (US$M)	1 847.7	1 921.9	1 928.0	1 967.9	1 975.5	2.1	0.4
Cruise Passenger Foreign Exchange Earnings (US$M)	77.7	79.3	80.5	101.7	101.5	26.3	-0.2

p-preliminary
r-revised
a-Average Length of Stay for Foreign Nationals

Source: Compiled from data supplied by the Jamaica Tourist Board

2013. Of this total, 693 participants were certified while 840 did not require certification. The total number of participants registered in the skills upgrading programmes included 800 students involved in the SIP. Some of the skills programmes implemented in 2013 were: Customer Service Excellence; Disney Cruise Line Training; Security Awareness; Supervisory Management, Protocol and Professional Etiquette; and linguistic training for workers in Spanish and Russian.

PERFORMANCE

Total Visitor Arrivals

During 2013, total visitor arrivals declined by 1.0 per cent to 3 273 677 (Table 17.1). This contraction was the result of a reduction in the number of cruise passenger arrivals, as the number of stopover arrivals increased. There were lower visitor arrivals for six months of the year, with February, April and May registering the largest declines (Figure 17B).

Stopover Arrivals

Total stopover arrivals grew by 1.1 per cent to 2 008 409 in 2013 (Table 17.2). This performance was due mainly to increased arrivals from the USA and Europe, two of Jamaica's major source markets. This was attributable to the recovery from the negative impact of Super Storm Sandy on visitors from the USA during 2012 as well as the introduction of flights from the Czech Republic and Russia.

For January-June 2013, stopover arrivals fell by 1.2 per cent to 1 059 470 relative to the corresponding period of 2012. This reflected declines in arrivals for the months of January, February and April (Figure 17C). For the latter half of the year, however, stopover arrivals increased by 3.8 per cent to 948 939.

The Foreign Nationals[3] category grew by 1.6 per cent to 1 860 935 while the number of Non-Resident Jamaicans declined by 4.1 per cent to 147 474 (see Table 17.2). The average length of stay for Foreign Nationals was 8.7 nights compared with 8.8 nights in 2011. This confirmed the declining trend observed since 2006 and partly reflected the persistent weakness in the global economy. The average length of stay for Non-Resident Jamaicans was 16.8 nights relative to 16.4 nights in 2012.

STOPOVER ARRIVALS FROM JAMAICA'S MAIN SOURCE MARKETS

USA

The USA continued to account for the largest share of stopover arrivals to Jamaica, representing 63.3 per cent of total visitors (Figure 17D). Stopover arrivals from the USA totalled 1 272 262, up 1.1 per cent relative to 2012 (see Table 17.2). This reflected increased arrivals from all regions, with the exception of the South. The number of stopover arrivals from the

3 This category consistently accounts for approximately 92.0 per cent of total stopover visitors.

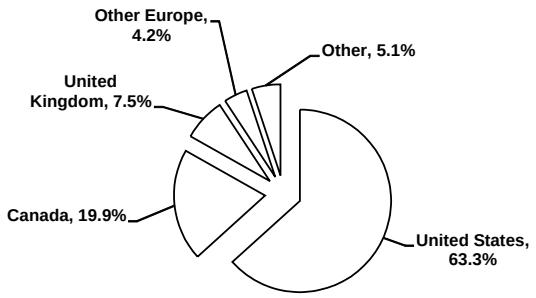

FIGURE 17D: SHARE OF STOPOVER ARRIVALS BY SOURCE MARKET, 2013

Northeast region[4] increased by 0.4 per cent to 570 555. Also, stopover arrivals from the Midwest (up 3.8 per cent) and West (up 4.8 per cent) regions amounted to 242 449 and 133 539, respectively. In contrast, visitors from the South region fell by 1.1 per cent to 324 719. Increased visitors from the USA reflected: (i) the recovery[5] from the negative impact of Super Storm Sandy on the east coast of the USA; (ii) the introduction of Fly Jamaica's service from New York's John F. Kennedy International Airport to Kingston's Norman Manley International Airport on February 14, 2013; (iii) the re-introduction of daily flights from Atlanta to Kingston on December 18, 2013 by Delta Airlines; and (iv) additional flights from Jet Blue and US Airways. The reduction in flight frequency by Caribbean Airlines and American Airlines partly countered the increase in flights during 2013.

Europe

Visitors from Europe rose by 6.0 per cent to 235 811 and accounted for 11.7 per cent of total stopover arrivals. This increase reflected improvements in the Northern and Central/East regions. Stopover visitors from Northern Europe and Central/East Europe increased by 4.8 per cent and 186.6 per cent to 158 713 and 17 472, respectively. Stopover arrivals from Southern/Western Europe decreased by 8.1 per cent to 59 626. The improved performance from Northern Europe was due mainly to an increase in arrivals from the UK, which rose by 4.2 per cent to 151 315 (see Table 17.2). The higher number of stopover arrivals from Europe emanated from: (i) the commencement of flights from the Czech Republic and Moscow to the Sangster International Airport (SIA) on December 28, 2012 and January 1, 2013, respectively; (ii) the

TABLE 17.2
STOPOVER ARRIVALS TO JAMAICA BY SOURCE MARKET, 2009–2013

	2009		2010		2011		2012		2013		% Change 2013 /12
	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	
United States	1 172 844	64.1	1 242 943	64.7	1 225 565	62.8	1 257 669	63.3	1 272 262	63.3	1.1
Canada	290 307	15.9	325 191	16.9	378 938	19.4	403 200	20.3	399 331	19.9	-1.0
Europe of which:	276 799	15.1	271 315	14.1	253 045	13.0	222 428	11.2	235 811	11.7	6.0
United Kingdom	184 512	10.1	184 355	9.6	173 507	8.9	145 231	7.3	151 315	7.5	4.2
Germany	20 220	1.1	18 857	1.0	19 939	1.0	20 236	1.0	19 658	1.0	-2.9
Spain	12 768	0.7	10 082	0.5	6 833	0.4	4 350	0.2	2 569	0.1	-40.9
Italy	14 588	0.8	13 700	0.7	11 700	0.6	9 672	0.5	7 808	0.4	-19.3
Other Europe	44 711	2.4	44 321	2.3	41 066	2.1	42 939	2.2	54 461	2.7	26.8
Caribbean	65 333	3.6	58 299	3.0	66 216	3.4	64 984	3.3	58 249	2.9	-10.4
Latin America	14 492	0.8	13 442	0.7	16 589	0.8	25 037	1.3	30 538	1.5	22.0
Asia	6 168	0.3	5 791	0.3	6 522	0.3	7 020	0.4	7 505	0.4	6.9
Other Countries	5 154	0.3	4 697	0.2	4 873	0.2	5 747	0.3	5 713	0.3	-0.6
TOTAL	1 831 097	100.0	1 921 678	100.0	1 951 752	100.0	1 986 085	100.0	2 008 409	100.0	1.1

Source: Compiled from data supplied by the Jamaica Tourist Board

4 The Northeast region typically accounts for the majority of visitors from the US market followed by the South.

5 This was associated with the discounting of fares by some airlines to improve travel from the region.

TABLE 17.3
CRUISE PASSENGERS TO FALMOUTH, 2012–2013

	2012					2013				
	Cruise Passengers	Prebooked Tours (a)	Freelance Tours (b)	Passengers Who Went on Tours (c)	% of Cruise Passengers Who Went on Tours	Cruise Passengers	Prebooked Tours (a)	Freelance Tours (b)	Passengers Who Went on Tours (c)	% of Cruise Passengers Who Went on Tours
January	76 155	28 117	12 474	40 591	53.3	92 553	36 580	6 258	42 838	46.3
February	66 122	26 163	10 131	36 294	54.9	75 067	32 708	4 356	37 064	49.4
March	71 080	33 399	8 720	42 119	59.3	83 411	40 041	4 657	44 698	53.6
April	51 202	22 316	7 547	29 863	58.3	56 991	26 646	3 015	29 661	52.0
May	41 915	17 857	5 594	23 451	55.9	36 366	16 975	2 176	19 151	52.7
June	33 357	15 982	3 608	19 590	58.7	33 617	16 421	1 932	18 353	54.6
July	33 495	15 854	2 129	17 983	53.7	40 002	19 695	2 748	22 443	56.1
August	39 486	16 104	3 280	19 384	49.1	33 631	15 096	2 158	17 254	51.3
September	30 701	10 814	2 404	13 218	43.1	30 395	11 872	1 829	13 701	45.1
October	34 462	12 113	2 309	14 422	41.8	45 190	17 396	3 600	20 996	46.5
November	41 346	15 055	2 347	17 402	42.1	46 927	16 937	3 489	20 426	43.5
December	67 257	23 508	6 036	29 544	43.9	72 286	25 285	7 609	32 894	45.5
Total	586 578	237 282	66 579	303 861	51.8	646 436	275 652	43 827	319 479	49.4

Note: a+b=c

Source: Compiled from data supplied by the Falmouth Cruise Pier

inaugural flight of Thomas Cook Scandinavia Airlines[6] to the SIA on November 23, 2013 and increased flights by Thomson Airways; and (iii) the addition of 140 seats to the Montego Bay route by Transaero with a new aircraft. This improvement was partly countered by the higher cost of travel from the United Kingdom as a result of the increase in air passenger duty[7] on April 1, 2013.

Latin America

Stopover arrivals from Latin America recorded an increase of 22.0 per cent to 30 538. Higher arrivals from this market reflected largely more visitors from Costa Rica, Chile, Argentina, Brazil and Mexico; which was facilitated by increased flights from Copa Airlines. The increase in stopover visitors from Latin America was supported by marketing activities targeting economies within this market.

Canada

Stopover arrivals from Canada amounted to 399 331, a decline of 1.0 per cent relative to 2012 (see Table 17.3). Canada accounted for 19.9 per cent of stopover visitors to the island. The decline in arrivals was recorded from all Canadian provinces, with the exception of Alberta, Newfoundland and Ontario[8]. Saskatchewan recorded the largest decline,

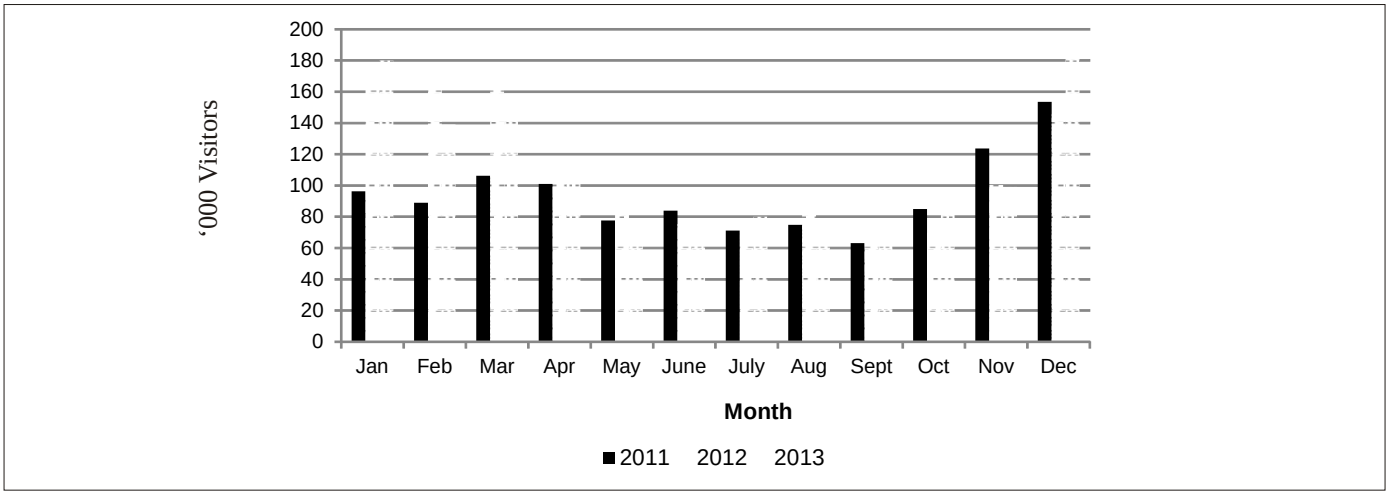

FIGURE 17E: CRUISE PASSENGER ARRIVALS BY MONTH, 2011–2013

6 This airline will operate from Sweden every two weeks until April 2014.

7 Air passenger duty is an excise duty which is charged on the carriage of passengers flying from a United Kingdom airport on an aircraft that has an authorised take-off weight of more than ten tonnes or more than 20 seats for passengers. The new rate is calculated based on the distance between London and the capital city of the destination country.

8 Ontario accounted for the majority of visitors from Canada and represented 64.0 per cent of stopover arrivals from the country during 2013.

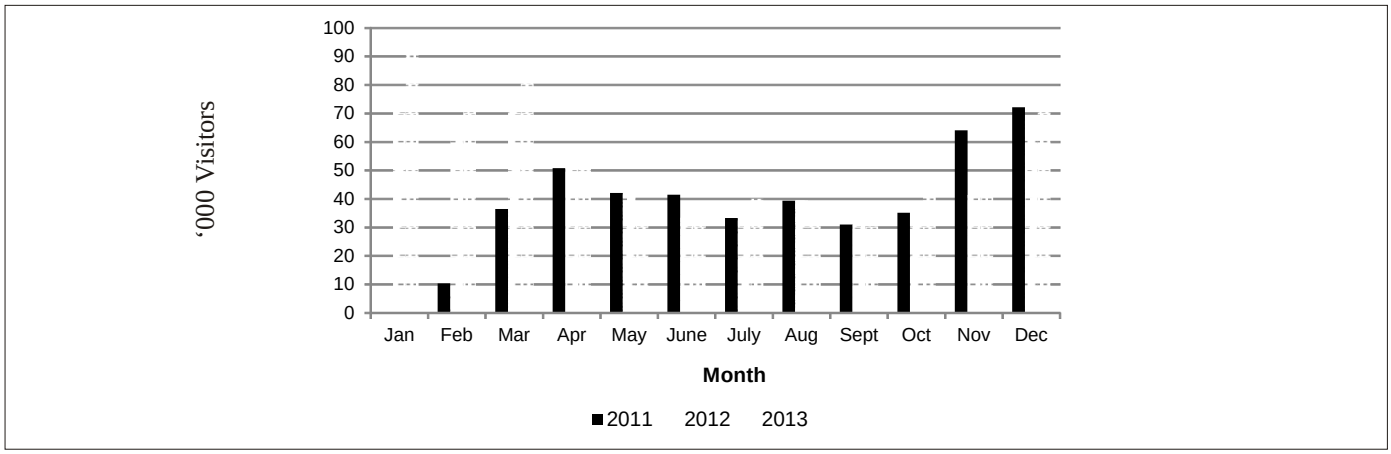

FIGURE 17F: CRUISE PASSENGERS TO FALMOUTH BY MONTH, 2011–2013

decreasing by 24.4 per cent to 11 303. This was followed by Manitoba with arrivals falling by 13.4 per cent to 9 355 and Quebec with visitors declining by 1.8 per cent to 54 599. The contraction in stopover arrivals was influenced by the closure of Sunquest Vacations, a major tour operator in Canada. Lower stopover arrivals were tempered by: (i) an increase in the load factors for Air Canada, Westjet and Sunwing; and (ii) Air Canada Rogue's commencement of daily flights between Toronto and Kingston on July 1, 2013 and between Toronto and Montego Bay on November 8, 2013.

Caribbean

Stopover arrivals from the Caribbean fell by 10.4 per cent to 58 249. Fewer visitors from the Caribbean were influenced primarily by lower arrivals from Trinidad and Tobago, Barbados and Antigua. This decline was associated with the reduction in flight frequency by Caribbean Airlines due to lower demand from these countries in 2013.

CRUISE PASSENGER ARRIVALS

Cruise passenger arrivals fell by 4.2 per cent to 1 265 268 (see Table 17.1 and Figure 17E). This contraction reflected reduced activities at the Montego Bay and Ocho Rios cruise piers, as the number of passengers to the Falmouth Cruise Pier increased. The number of ship calls to the island's ports also decreased, moving to 360 from 384 in 2012.

For the first six months of 2013, there was an 8.5 per cent reduction in the number of cruise passenger arrivals to 709 733 and a 10.7 per cent decline in the number of cruise ship calls to 208. During the latter half of the year, there was a 2.0 per cent increase in cruise passenger arrivals to 555 535 and a 0.7 per cent upturn in the number of ship calls to 152. There was a higher passenger load factor during July-December 2013 relative to the first half of the year.

Falmouth

The number of ship calls to Falmouth totalled 154 relative to 135 during 2012. This facilitated a total of 646 436 cruise passengers compared with 586 578 in 2012 (Table 17.3 and Figure 17F). The number of passengers visiting Falmouth represented 51.1 per cent of total cruise passengers during 2013. Of the total visiting Falmouth, 275 652 participated in pre-booked tours and 43 827 participated in freelance tours. For 2012, a total of 237 282 participated in pre-booked tours and

TABLE 17.4
CRUISE PASSENGERS TO MONTEGO BAY, 2012–2013

	Cruise Passengers	Prebooked Tours (a)	Freelance Tours (b)	2012 Passengers Who Went on Tours (c)	% of Cruise Passengers Who Went on Tours	Cruise Passengers	Prebooked Tours (a)	Freelance Tours (b)	2013 Passengers Who Went on Tours (c)	% of Cruise Passengers Who Went on Tours
January	43 849	22 537	12 744	35 281	80.5	41 692	22 397	12 861	35 258	84.6
February	41 301	23 220	11 693	34 913	84.5	23 392	14 121	5 791	19 912	85.1
March	34 962	20 116	8 903	29 019	83.0	24 514	13 926	7 139	21 065	85.9
April	26 278	15 266	6 280	21 546	82.0	16 773	10 476	4 656	15 132	90.2
May	26 623	15 775	7 505	23 280	87.4	15 641	9 894	3 784	13 678	87.4
June	20 944	14 041	5 053	19 094	91.2	11 391	8 379	2 839	11 218	98.5
July	23 861	15 223	6 475	21 698	90.9	16 561	10 822	4 257	15 079	91.1
August	30 406	16 859	9 229	26 088	85.8	10 928	5 800	3 307	9 107	83.3
September	24 184	13 334	6 787	20 121	83.2	12 227	7 307	3 224	10 531	86.1
October	19 643	11 246	5 288	16 534	84.2	16 332	8 490	4 798	13 288	81.4
November	20 645	11 984	5 176	17 160	83.1	14 575	6 891	3 410	10 301	70.7
December	26 276	14 731	7 013	21 744	82.8	33 930	18 072	10 099	28 171	83.0
Total	338 972	194 332	92 146	286 478	84.5	237 956	136 575	66 165	202 740	85.2

Note: a+b=c

Source: Compiled from data supplied by the Montego Bay Cruise Pier

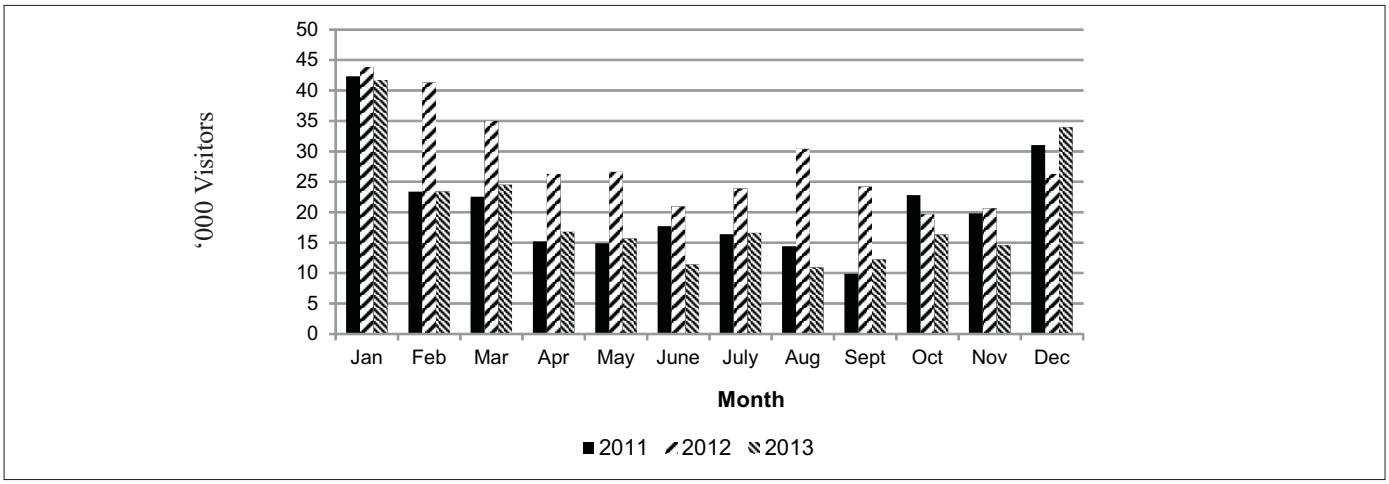

FIGURE 17G: CRUISE PASSENGERS TO MONTEGO BAY BY MONTH, 2011–2013

66 579 participated in freelance tours. Approximately 49.0 per cent of cruise passengers participated in tours during 2013 compared with almost 52.0 per cent in 2012.

Montego Bay

Montego Bay received a total of 237 956 cruise passengers compared with 338 972 in 2012 (Table17.4 and Figure 17G). This was the result of a reduction in the number of ship calls by 24 to 86 during 2013. Approximately 85.0 per cent of cruise passengers participated in tours, the same as the share in 2012. Participation in pre-booked tours totalled 136 575 compared with 194 332 in 2012 (see Table 17.4). The number of passengers who participated in freelance tours was 66 165 relative to 92 146 in 2012.

Ocho Rios

A total of 380 876 cruise passengers visited Ocho Rios, 3.2 per cent lower than in 2012 (Figure 17H). The number of ship calls also declined, falling from 139 in 2012 to 120 during 2013. The reduction in cruise passenger arrivals to the Ocho Rios port occurred in the context of increased activities at the neighbouring Falmouth Cruise Pier.

Tourist Expenditure

Provisional tourist expenditure amounted to US$2 077.1 million, 0.4 per cent more than in 2012. Of this amount, stopover visitors expended US$1 975.5 million while cruise passengers spent US$101.5 million. For 2012, stopover expenditure amounted to US$1 967.9 million and cruise passenger expenditure totalled US$101.7 million (Figures 17I and 17J).

Average expenditure per visitor in 2013 was US$634.5 compared with US$626.0 during 2012. For 2013, average expenditure per stopover visitor per day amounted to US$113.06, higher than US$112.59 in 2012. Similarly, average expenditure per cruise passenger was US$80.3 relative to US$77.0 during 2012.

Employment[9]

The average annual employment in the Hotels and Restaurants industry was 75 750 persons compared with 76 250 persons during 2012. This represented approximately 7.0 per cent of total employment for both 2013 and 2012. The average number of males employed within the industry totalled 31 375

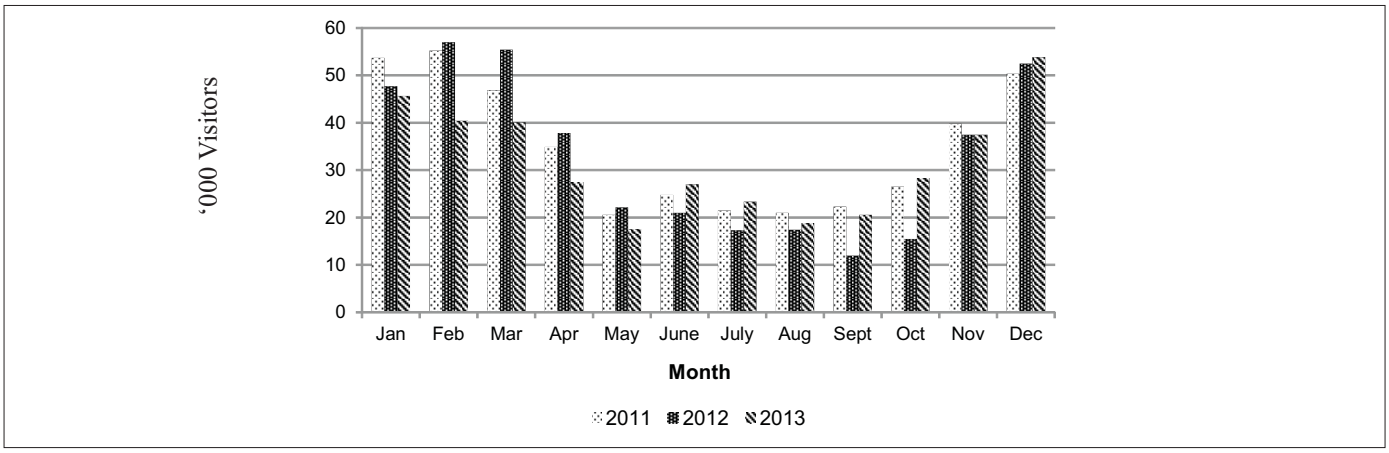

FIGURE 17H: CRUISE PASSENGERS TO OCHO RIOS BY MONTH, 2011–2013

9 STATIN's estimates.

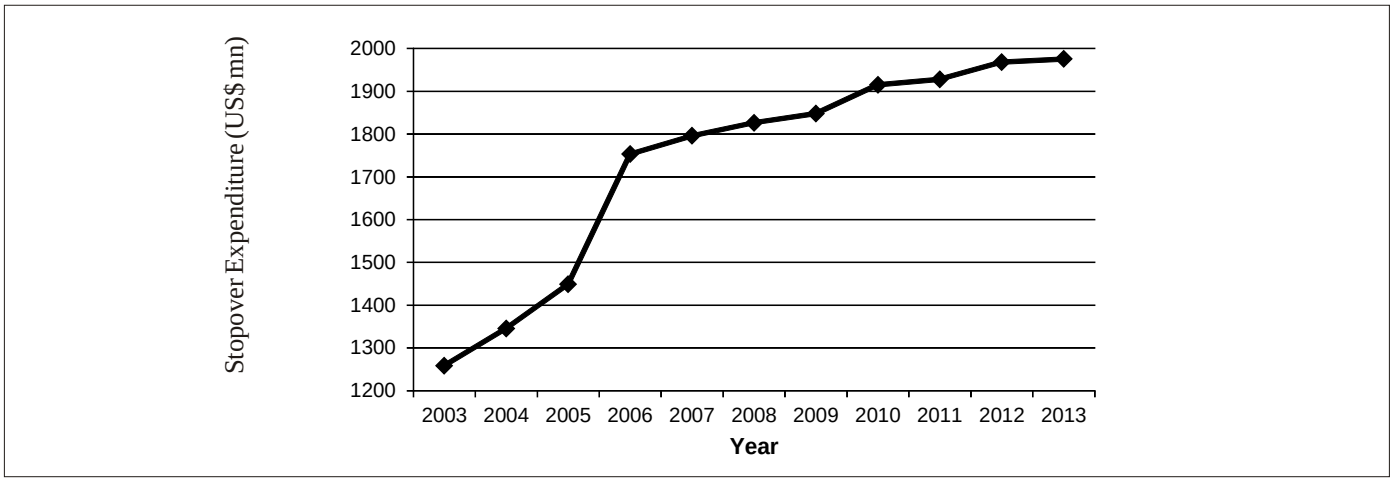

FIGURE 17I: STOPOVER EXPENDITURE, 2003–2013

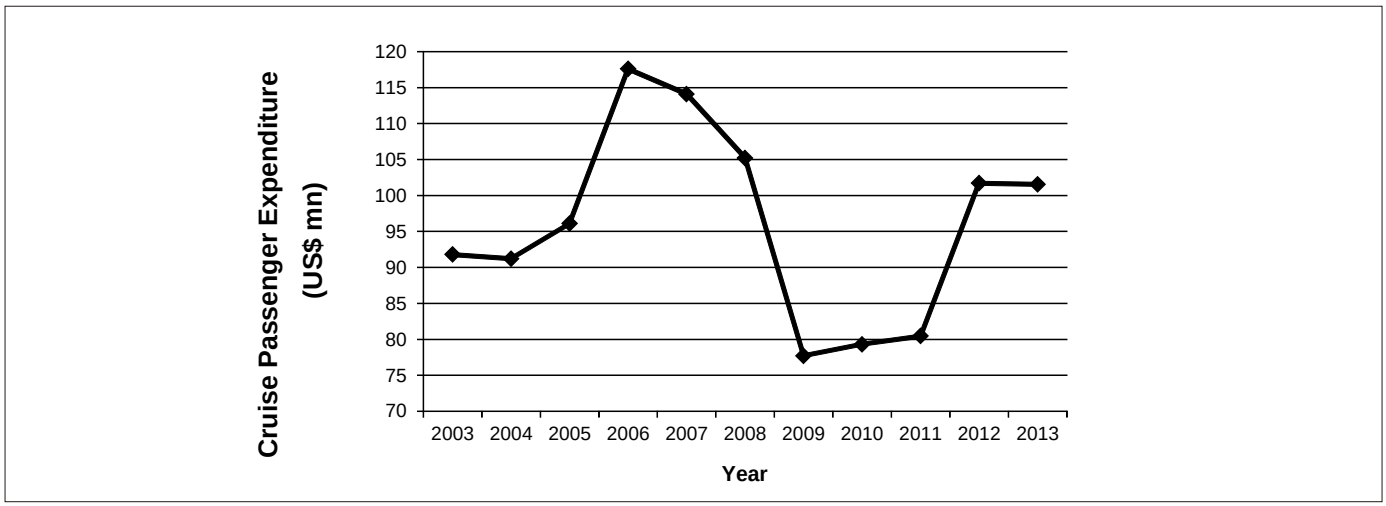

FIGURE 17J: CRUISE PASSENGER EXPENDITURE, 2003–2013

relative to 32 000 in 2012. For females, the average number employed was 44 375 compared with 44 250 in 2012.

Loans & Advances

At the end of 2013, the stock of Loans & Advances issued to the Hotels & Restaurants industry by commercial banks was $27.5 billion compared with $26.3 billion at the end of 2012. The stock of Loans & Advances to this industry from institutions licensed under the Financial Institutions Act at the end of 2013 was $201.4 million compared with $120.0 million at the end of 2012.

CARIBBEAN AND INTERNATIONAL DEVELOPMENTS

Caribbean Tourism Performance [10]

Stopover Visitor Arrivals

Data from the Caribbean Tourism Organization (CTO) showed that there was growth in stopover arrivals for most countries in the region. The Dominican Republic (up 2.8 per cent), Cuba (up 0.4 per cent), Jamaica (up 1.1 per cent), Puerto Rico (up 1.5 per cent) and Aruba (up 8.3 per cent) accounted for approximately 63.0 per cent of stopover visitors to the Caribbean (Table 17.5). There were declines in stopover arrivals for: Antigua & Barbuda (5.4 per cent), Bahamas (4.1 per cent), Barbados (5.2 per cent), Grenada (0.8 per cent), St. Vincent & the Grenadines (3.5 per cent), Turks & Caicos Islands (0.4 per cent) and the U.S. Virgin Islands (4.7 per cent) {see Table 17.5}.

10 This section is based on the most current information from the Caribbean Tourism Organization.

TABLE 17.5
STOPOVER ARRIVALS TO THE CARIBBEAN, 2013

COUNTRY	PERIOD	2013	% Change 2013 /2012
ANGUILLA	JAN-DEC	69 068	6.8
ANTIGUA & BARBUDA [a]	JAN-JUL	149 464	-5.4
ARUBA	JAN-DEC	979 256	8.3
BAHAMAS	JAN-DEC	1 363 487	-4.1
BARBADOS [p]	JAN-DEC	508 520	-5.2
BELIZE [p]	JAN-DEC	294 176	6.1
BERMUDA [a]	JAN-DEC	236 343	1.8
BRITISH VIRGIN ISLANDS	JAN-DEC	355 677	1.2
CAYMAN ISLANDS	JAN-DEC	345 387	7.4
CUBA	JAN-DEC	2 850 135	0.4
CURACAO	JAN-DEC	440 044	4.9
DOMINICA p	JAN-DEC	78 252	0.2
DOMINICAN REPUBLIC [a]	JAN-DEC	4 689 770	2.8
GRENADA	JAN-OCT	89 070	-0.8
GUYANA [c]	JAN-OCT	165 841	11.6
HAITI	JAN-SEP	299 646	17.9
JAMAICA	JAN-DEC	2 008 409	1.1
MARTINIQUE	JAN-DEC	489 706	0.3
MONSTSERRAT	JAN-NOV	6 132	36.3
PUERTO RICO [b]	JAN-SEP	1 217 655	1.5
ST. LUCIA	JAN-DEC	318 626	3.9
ST. KITTS & NEVIS	JAN-DEC	100 997	3.2
ST. MAARTEN [a]	JAN-DEC	467 259	2.3
ST. VINCENT & THE GRENADINES	JAN-DEC	71 725	-3.5
SURINAME	JAN-OCT	202 225	4.8
TURKS & CAICOS ISLANDS	JAN-DEC	290 587	-0.4
U.S. VIRGIN ISLANDS	JAN-DEC	702 963	-4.7

a-Non-Resident Air Arrivals b-Non-Resident Hotel Registrations Only c-Figures now include land border arrivals which were previously not captured
p-preliminary
N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

Cruise Passenger Arrivals

The CTO reported higher cruise passenger arrivals for the Bahamas (6.2 per cent), U.S. Virgin Islands (4.9 per cent), St. Maarten (1.5 per cent), and Puerto Rico (11.8 per cent) {Table 17.6}. Passengers from these countries accounted for approximately 53.0 per cent of cruise visitors to the Caribbean. However, there was a fall-off in cruise passenger arrivals to the Cayman Islands (8.7 per cent), Jamaica (4.2 per cent), Antigua & Barbuda (1.1 per cent) and British Virgin Islands (5.9 per cent) {see Table 17.6}.

International Tourism Performance[11]

The UNWTO estimated that international tourist arrivals grew by 5.0 per cent to a record 1 087.0 million during 2013. International tourist arrivals exceeded expectations despite global economic challenges, with an additional 52.0 million tourists travelling compared with 2012.

Tourist arrivals to Europe grew by 5.0 per cent to 563.0 million and accounted for approximately 52.0 per cent of visitors globally. Growth in the region was driven by increased arrivals to Central and Eastern Europe; and the Southern Mediterranean destinations.

Tourist arrivals to the Asia & the Pacific region increased by 6.0 per cent to 248.0 million and represented approximately 23.0 per cent of global visitors. Growth was supported by more arrivals to South-East Asia, North-East Asia, South Asia and Oceania.

The Americas registered an increase of 4.0 per cent in tourist arrivals to 169.0 million. North and Central America (4.0 per cent each) were the most significant contributors to the improved performance of the Americas, with South America (up 2.0 per cent) and the Caribbean (up 1.0 per cent) also recording increases.

Tourist arrivals reached a record 56.0 million for Africa in 2013, an increase of 6.0 per cent. This improvement was due to the continued rebound in North Africa (up 6.0 per cent) and sustained growth in Sub-Saharan destinations (up 5.0 per cent). However, tourist arrivals to the Middle East remained relatively unchanged relative to 2012.

11 This section is based on the most current information from the World Tourism Organization.

TABLE 17.6
CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN, 2013

COUNTRY	PERIOD	2013	% Change 2013 /2012
ANTIGUA & BARBUDA	JAN-AUG	379 291	-1.1
ARUBA	JAN-DEC	688 568	18.2
BAHAMAS	JAN-DEC	4 709 236	6.2
BARBADOS [p]	JAN-DEC	570 263	10.2
BELIZE	JAN-DEC	677 350	5.7
BERMUDA [a]	JAN-DEC	320 090	-15.4
BONAIRE	JAN-SEP	96 818	-10.7
BRITISH VIRGIN ISLANDS	JAN-DEC	367 362	-5.9
CAYMAN ISLANDS	JAN-DEC	1 375 872	-8.7
CURACAO	JAN-DEC	610 186	41.4
DOMINICA [p]	JAN-DEC	230 587	-13.4
DOMINICAN REPUBLIC [a]	JAN-OCT	299 828	12.4
GRENADA	JAN-JUN	133 165	-21.8
HAITI	JAN-DEC	643 634	5.5
JAMAICA	JAN-DEC	1 265 268	-4.2
MARTINIQUE	JAN-DEC	103 770	11.0
PUERTO RICO [b]	JAN-DEC	1 176 343	11.8
ST. LUCIA	JAN-DEC	594 118	3.9
ST. MAARTEN	JAN-DEC	1 779 384	1.5
ST. VINCENT & THE GRENADINES	JAN-DEC	82 974	7.8
TURKS & CAICOS ISLANDS	JAN-DEC	778 920	15.1
U.S. VIRGIN ISLANDS	JAN-DEC	1 998 579	4.9

a-Non-Resident Air Arrivals b-Non-Resident Hotel Registrations Only
p-preliminary
N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

OUTLOOK

Real value added for the Hotels & Restaurants industry is expected to increase during 2014. This growth is predicated on increased stopover arrivals, which are associated primarily with new airlift from Europe. Also, higher cruise passenger arrivals are expected stemming from the anticipated introduction of new cruise vessels (Disney Fantasy and Thomson Dream) to the island during 2014.

With regard to stopover arrivals, increased arrivals are anticipated from Germany, Sweden and Russia. In November 2013, Munich, Germany became the most recent gateway for passengers visiting Jamaica. This first series is projected to last for six months to April 2014. The flight will be shared with Cuba, however, two thirds of the seats have been allocated for Jamaica. The introduction of charter flights between Sweden and Montego Bay during November 2013 by TUI Nordic and Thomas Cook Nordic will also contribute to higher stopover arrivals in 2014. The two airlines are expected to operate until April 2014 and individual stays will be 14 nights each. BiblioGlobus will continue to operate charters from Russia until March 30, 2014. The service commenced on August 1, 2013.

There are increased investment prospects for the Hotels & Restaurants industry as there are several plans to expand or construct hotels during 2014. Notably, phase two of the Royalton Memories White Sands Resort is projected to start construction in May. Also, there is ongoing construction of a 161-room business hotel and six-block apartment complex in Kingston by the Marriott Group, which is scheduled to be completed during 2015. Additionally, expansion began on the Hyatt Ziva by Playa Hotels and Resorts in January 2014, with an anticipated opening date of November 1 2014. The expansion of the Hyatt Ziva will add 193 rooms to the former Ritz Carlton property, bringing the total room stock to 427.

The UNWTO forecasts growth in global tourist arrivals within the range of 4.0 per cent and 4.5 per cent in 2014. It is anticipated that the main drivers of this growth will stem from increased arrivals to Asia and the Pacific (5.0 per cent to 6.0 per cent), Africa (4.0 per cent to 6.0 per cent), the Americas and Europe (3.0 per cent to 4.0 per cent) and the Middle East (0.0 per cent to 5.0 per cent). The forecast for 2014 is above the long-term projection of 3.8 per cent between 2010 and 2020.■

CHAPTER 18

ENTERTAINMENT & SPORTS

INTRODUCTION

For 2013, the Other Services Industry — of which the Recreational, Cultural and Sporting (RCS) sub-industry accounts for the largest share — recorded growth of 0.1 per cent in real value added. Improvements were also recorded for several indicators, which are used to track the annual performance of the RCS sub-industry. Of note were: higher real gross sales by entertainment categories; increases in the number of amusement licences issued and revenue collected from their issuance; higher capital expenditure associated with the implementation of creative industry projects; and growth in financial support to and investment in entertainment and sport, evidenced by higher grants by the Sports Development Foundation (SDF) to sporting associations and increased loans for entertainment purposes.

Efforts to ensure that media content was appropriate for public broadcast continued, with the expansion of the Broadcasting Commission of Jamaica's (BCJ) citizen-based content monitoring programme. Media literacy was also strengthened through its inclusion in the curriculum of Teachers' Colleges across the island.

In 2012, the RCS sub-industry recorded a 2.2 per cent increase in real value added[1] and contributed 2.7 per cent to overall Gross Domestic Product. In 2011, the sub-industry recorded growth of 0.3 per cent[2].

POLICIES AND PROGRAMMES

During the year, several policies and programmes were pursued to further the development of the RCS industry, in keeping with the Vision 2030 Jamaica – National Development Plan. These included:

Event Rating Guidelines

Stakeholder consultations aimed at developing a guide for entertainment practitioners and consumers of entertainment, through the institution of ratings for entertainment events, continued in 2013. The rating guidelines will provide information on the types of content suitable for varying audiences by examining the references, actions, promotion and marketing of sex, violence, nudity, strong language, and use of alcohol and drugs. An educational campaign is to be rolled out in the first quarter of FY2014/2015.

Protection of Reggae

The Ministry of Tourism and Entertainment (MTE); Jamaica Intellectual Properties Organization (JIPO); and the Ministry of Youth and Culture (MYC) collaborated during the year to:

- have reggae included on the UNESCO Representative List of the Intangible Cultural Heritage of Humanity
- develop a joint national policy for the protection of reggae, mento, ska, rock steady, dancehall and other distinctly Jamaican musical art forms as intangible cultural heritage.

Entertainment Registry

The establishment of a National Entertainment Registry (NER) was approved during the year. The registry, which will be the central portal for information on the industry, is to be established in three phases and is aimed at authenticating the legitimacy of persons within the industry including artistes, service providers and other sectors of support for entertainment.

Phase I of the process which involved the creation of Individual and Corporate forms was completed in December. The forms were approved by a wide cross section of stakeholders and have been uploaded to the website of the MTE. User requirements which are to be finalized as a critical component of the tender process for a stand-alone Registry site, were at ninety per cent completion at the end of the year. The NER is also intended to facilitate free movement of entertainment practitioners within CARICOM and provide access to a Regional Cultural Exemptions Regime[3].

Intellectual Property (IP)

Protection of Jamaican Popular Music

Recognizing copyright as central to the development and commercialization of the entertainment industry, the World Intellectual Property Organization (WIPO) in June 2013, organized a mission for a Consultant on Reggae and other Jamaican music forms to meet with stakeholders. This meeting was aimed at identifying possible methods of protecting Jamaican popular music particularly reggae, but also including ska, mento, rock steady and dancehall. JIPO undertook a series

1 Real value added for the RCS sub-industry is reported with a one-year lag.

2 The real value added out-turn for the RCS sub-industry for 2011 was revised.

3 The regime will facilitate a CARICOM Registry of bona fide artists and cultural entrepreneurs administered at the national level with mutual regional recognition, and will include: a Common External Tariff-level list of cultural inputs eligible for exemptions, going beyond tools of trade; adequate financial incentives by exemption from internal taxes, import duties and Other Duties and Charges; enactment of appropriate legislation; ensuring freedom of movement throughout CARICOM; ease of use for the cultural sector; a flexible and adaptable pilot programme, and regular reviews.

of formal and informal consultations with industry authorities, associations and practitioners. Based on these consultations and the results of the Consultant's research, a raft of possible programmes and activities geared towards developing this national priority sector will be implemented.

Madrid Protocol[4]

Consultations were carried out with stakeholder interests in the Entertainment Industry on the international system for the registration of Trade Marks – the Madrid Protocol, which is administered by WIPO. The results of the consultations were considered in drafting the amendments to the Trade Marks Act, which was passed in the House of Parliament in July. The amendments were aimed at modernizing the framework for intellectual property in Jamaica.

Implementation of the GDA[5] *Digital Voluntary Copyright Registration System*

The development and installation of the GDA Digital Voluntary Copyright Registration System software platform, which will be used to facilitate voluntary copyright registration in Jamaica, was completed by JIPO. Staff members of JIPO continued to receive training and refresher courses to operate the system, which has been customized for Jamaica, the first English-speaking nation to utilize the software and the first to introduce a purely digital system. Jamaica's intellectual property regime will be further bolstered by the implementation of the Pilot Phase Initiative for the system, which is slated to commence between January and May 2014 at the Edna Manley College. During this time, staff and students of the institution will be allowed to register copyright works free of cost, with full implementation of the registration to follow once the amendment of the Copyright Act is passed in the Houses of Parliament.

Sports

National Sport Policy

The National Sport Policy was finalized and tabled in Parliament on March 26, 2013, setting the framework for the future development of sports. The vision of the policy is to create a dynamic and enabling environment in which persons enjoy and excel in sports at all levels; build strong bonds of unity in their communities; and benefit from economic opportunities derived from sports.

Re-Establishment of the National Council on Sport (NCS)

The NCS was reconvened in 2013. The twenty-four member advisory body comprises representatives of ministries, departments and agencies, private sector, other organizations as well as individuals involved in organizing and directing sports. The role of the Council is to advise the government on sports development and the coordination of sport activities to ensure that they are in keeping with the National Sport Policy.

Health Insurance Plan for Athletes

In keeping with its commitment under the National Sport Policy[6], the government, in July 2013, announced plans for the introduction of a health insurance scheme to provide coverage for all qualified national athletes. The benefits are expected to cover a maximum of 1 500 athletes from 40 sporting disciplines in the first instance. All national sports associations and federations have endorsed the scheme. Government has so far secured the funds to implement the programme for the first three years. Plans are under way to develop the procurement documentation and issue a Request for Proposal.

Strengthening Sport-Tourism Linkages

A Sport Tourism Committee (JAMAICA SPORT) was established during the year through collaboration between the MTE and the Office of the Prime Minister (OPM) (Sport). The mission of the committee is to identify and support events or activities which focus primarily on marketing the sports component of Brand Jamaica. A National Coordinator was contracted to assist in positioning sports and related events as major economic components in the development of Jamaica.

The Sport Leadership and Youth Development Training Project - Beckwith International Leadership Development (BILD) Jamaica

The BILD JAMAICA project commenced in 2013 and is a collaborative effort between the GOJ, international partners, and the private sector to tackle the lack of employment opportunities for unattached youth across Jamaica. The main partners are BILD UK SPORTS, International Inspiration[7], the Social Development Commission (SDC), G.C. Foster College of Physical Education & Sport, National Youth Service, the National Centre for Youth Development, the Sports Development Foundation (SDF), Community Based Organizations (CBOs) and community based private sector partners. BILD aims to inculcate values such as teamwork, community advocacy, time management, strategic thinking, punctuality and efficiency in participants. The project will be implemented over a four-year period, training 600 sports leaders annually. These leaders will be deployed across the island and will ultimately impact 120 000 unattached youth over the life of the project.

Sport Infrastructure Improvement

In November, the government launched the High School Sport Infrastructure Improvement Project (HSSIIP). The project will facilitate the improvement of 24 high schools across the island through an investment of $250.0 million over two years. The HSSIIP is being funded by the SDF and the Sugar Transformation Project.

4 The system of international registration of marks is governed by two treaties: the Madrid Agreement Concerning the International Registration of Marks, which dates from 1891, and the Protocol Relating to the Madrid Agreement, which was adopted in 1989, entered into force on December 1, 1995, and came into operation on April 1, 1996. A country may become a party to either the Protocol or the Agreement or both. By filing a single application (called "international application") in one language, a single registration (called "international registration") is obtained, which secures protection for a mark in several countries.

5 The Gestion de Derechos de Autor (GDA) System; French for Rights Management Copyright.

6 A pension plan for athletes is still being discussed, with a view to making it a contributory scheme.

7 International Inspiration programmes help encourage young people to play their role in civil society, developing their leadership potential through sports and broadening access to sustainable livelihoods. These activities use the medium of high quality and inclusive sports to support Millennium Development Goals relating to education, gender and inclusion, health, and global partnerships, leading to long-term and positive social change.

Legislative Developments and Initiatives

Change to the Tax Status of Sporting Bodies

The Charitable Organizations (Tax Harmonization) Act 2013 and a Bill, Charities Act 2013, were passed during the year. Provisions within these two pieces of legislation allow for exemptions to support the development of amateur sports, as there are no established professional sporting leagues in Jamaica. These amendments paved the way for the sports industry to benefit from tax relief. The SDF is now an approved charitable organization and is entitled, inter alia, to the following:

- Exemption of its income under Section 12h of the Income Tax Acts 1955 (amended 2009)
- Zero-rating of goods and services acquired for the charitable purposes under Group 9, Part 11 of the First Schedule of the GCT Act
- Refund of GCT paid under Section 43 of the GCT Act (to be claimed within two years of purchase)
- Exemption under Section 10(1)(b) of the Property Tax Act 1903 (amended 2008)
- Exemption under the Stamp Duty Act 1937 (amended 2000) – Conveyances
- Exemption under Section 17(1) of the Transfer Tax Act 1971 (amended 2003)
- Exemption under Section 5(2) of the Customs Act 1941 (amended 2009).

Noise Abatement Act

The proposal to amend the Noise Abatement Act 1997 was revised in 2013. This included provisions for granting extensions of time for events; and the establishment of a six person Extension Committee in each parish to review such requests. Revisions were completed and circulated to the relevant ministries for review. On completion, the revised document will be submitted to the Attorney General's Office.

The MTE currently receives applications requesting extensions in time for events which may go beyond the 2:00 a.m. cut-off time for parties. During the year, 301 applications were received, of which 283 were approved. These events generated linkages[8] of $286.6 million and temporary employment for 7 791 persons. Application for event time extension is a legal requirement in the proposed amendments to the Noise Abatement Act.

Amendment to the Betting, Gaming and Lotteries Act

In April, the GOJ amended the fee and gross profit tax structure of the betting, gaming, and lottery sector. The amendments included changes to:

- the tax payable on gaming products
- the percentage of gaming products allocable to the CHASE Fund
- the number of gaming days by allowing gaming on public holidays and Sundays.

In light of these changes and their potential dampening impact on gaming proceeds, the SDF requested a modification in the payment policy associated with its gaming proceeds entitlements. Based on Section 5G of the Betting, Gaming & Lotteries Act, the SDF is entitled to 40.0 per cent of the gaming proceeds received by the CHASE Fund. In practice, 80.0 per cent of this amount has been paid to the SDF, with the remaining 20.0 per cent withheld by the CHASE Fund as reserve and paid after 13 months.

The request was for 90.0 per cent of the entitled gaming proceeds to be paid over, with the remaining 10.0 per cent withheld and paid over 13 months later. The request was supported by the Fund and the new payment structure was implemented in 2013.

Copyright Act

At the end of 2013, the Copyright (Amendment) Bill was being drafted. On completion, the amended Act will facilitate the following:

- Jamaica's accession to the WIPO Copyright Treaty.
- Incorporation of provisions of the WIPO Copyright Treaty to protect authors, composers and creators of literature.

The achievement of these objectives will allow:

- access to copyright works by persons with disabilities
- the establishment of a voluntary deposit system for copyright works to be hosted by JIPO
- the establishment of the duration of copyright for works created by the Crown and corporate bodies
- provision for access to orphan works[9]
- clarification of the rights in adapted works
- extension of the rights of libraries and archivists to archive material that was in digital format
- protection of first importers of sound recordings in Jamaica by ensuring them the first right of distribution of same.

Broadcasting

Media Literacy

The BCJ's thrust to strengthen this area continued in 2013 with the inclusion of media literacy into the curriculum for Teachers' Colleges islandwide. This will facilitate the integration of media literacy in the delivery of education, and will use teaching materials developed by the BCJ in collaboration with UNESCO, the Ministry of Education and the Joint Board of Teacher Education.

Twenty-eight schools and over 4 000 students benefited from the BCJ's Schools Outreach Initiative, aimed at exposing children and youth to opportunities and risks in the digital

8 Linkages refer to monies expended for temporary employment; securing venues; hiring artistes; purchasing food and beverages; and payment of permits and fees et cetera.

9 An orphan work is a copyright protected work for which rights holders are positively indeterminate or are unable to be contacted.

information age. In addition, 150 students and their teachers, from Flanker All-Age, Granville Primary, Central Branch Primary, Balcombe Drive Primary, and Calabar Primary and Junior High School, were trained in practical media operations.

Content Monitoring

Eighty-five citizens across the country were trained in the fundamentals of broadcast regulations and standards, expanding the BCJ's Voluntary Citizen-based Media Monitoring Programme to 325.

During the period June 2012 to November 2013, the Broadcasting Commission held islandwide meetings and consultations with broadcast and cable licensees and the viewing and listening public/citizens, to discuss initiatives to improve content standards, quality of service as well as the inclusiveness of and access to media by persons with disabilities. Areas of concern that were identified related primarily to problematic content, aired on both regulated and unregulated platforms. The feedback that emerged from the consultations will form the basis of discussions on the policy and regulatory environment as it relates to content regulation.

Digital Switchover Project

A Feasibility Study entitled the Introduction of Digital Terrestrial Television in Jamaica was completed in 2013 by the BCJ; the Office of the Prime Minister; and the College of Business & Management, University of Technology (UTech). The completed study provided guidance to the Digital Television Steering Committee on the technical standards; implementation challenges; and the potential economic and financial benefits that may be associated with the introduction of digital television locally. Going forward, the main focus of the committee is to facilitate the establishment of the digital switchover programme management office and identify possible funding opportunities. At the end of December, 15 cable providers were operating either full or partial digital subscriber television systems.

PERFORMANCE

REAL VALUE ADDED FOR 2012[10]

For 2012, real value added for the RCS sub-industry increased by 2.2 per cent[11] (Figure 18A). In 2011, the sub-industry grew by 0.3 per cent.

The category accounted for 38.5 per cent of the Other Services category and 2.7 per cent of Gross Domestic Product. RCS accounted for 2.6 per cent of GDP in 2011 (Figure 18B).

Creative Industries Investment Projects

For FY2013/14, the Creative Industries Unit at JAMPRO facilitated 84 investment projects, one more than for FY2012/13. These projects were disaggregated in the following areas:

- Film/Television – 62
- Music Projects – 2
- Photography – 10
- Radio – 2
- Special Events – 8

Capital expenditure associated with these projects amounted to $813.3 million, while temporary and permanent employment were created for 2 198 and 35 persons, respectively. For 2012/13, projects facilitated by JAMPRO generated capital expenditure of $1 160.5 million as well as temporary and permanent employment of 5 138 and 45 persons, respectively.

Motion Picture, Radio, Television & Other Entertainment Activities

An assessment of preliminary GCT data for 2013 indicated that gross sales[12] of selected entertainment categories increased by 5.3 per cent compared with 2012. This performance reflected increased sales by Other Entertainment Products &

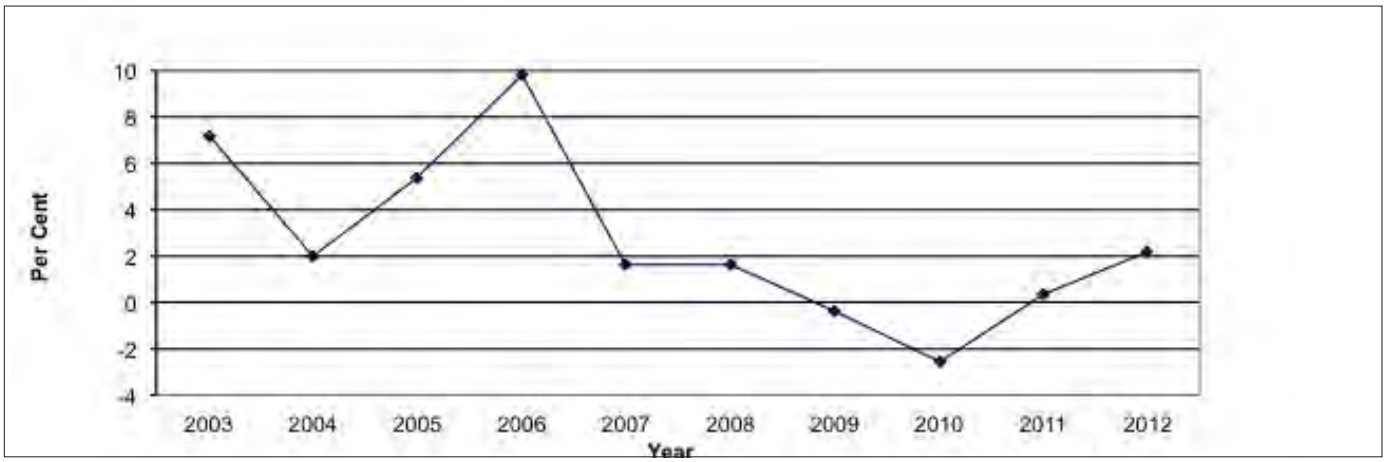

FIGURE 18A:PERCENTAGE CHANGE IN REAL VALUE ADDED FOR RECREATIONAL, CULTURAL AND SPORTING ACTIVITIES, 2003–2012

10 Real Value Added for the RCS sub-industry is reported with a one-year lag. The sub-industry accounts for the majority of entertainment and sporting activities. The RCS sub-industry is a subset of the Other Services Industry.
11 Real Value added figures for the industry have been revised.
12 Gross sales for the industry are obtained from General Consumption Tax (GCT) filings by compliant taxpayers.

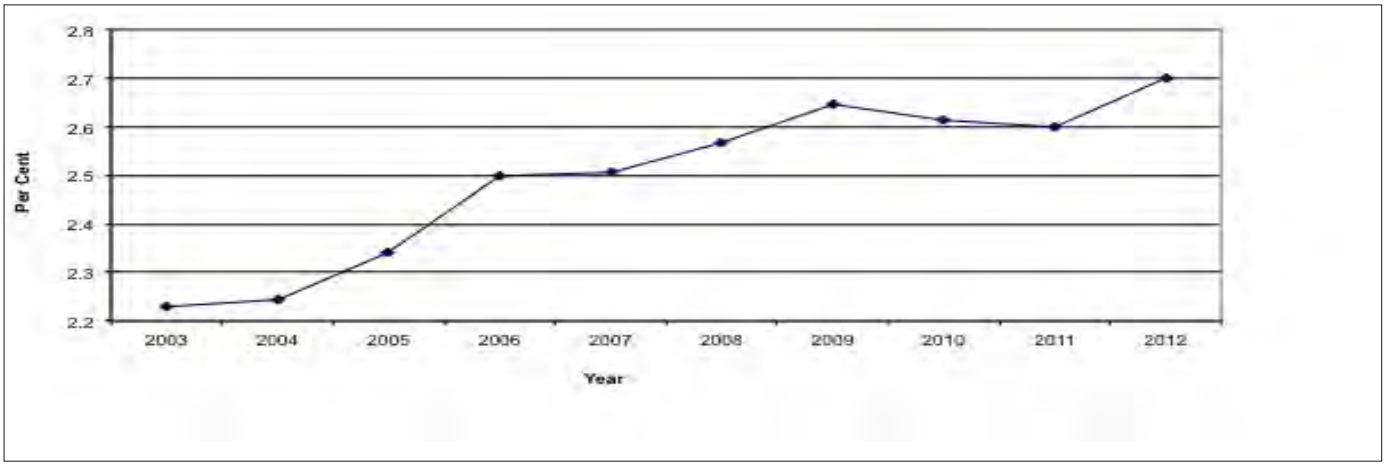

FIGURE 18B: SHARE OF RECREATIONAL, CULTURAL AND SPORTING ACTIVITIES IN REAL GROSS DOMESTIC PRODUCT, 2003–2012

Services (up 23.5 per cent) and Motion Picture Projections & Other Entertainment Services (up 12.2 per cent), as all other categories recorded lower sales. These two categories combined accounted for 74.6 per cent of Total Gross Sales by Entertainment categories for 2013. Growth in Motion Picture Projections & Other Entertainment Services may have been boosted by a $169.5 million investment which was expended on projects facilitated by JAMPRO under the motion picture recognition status facility in 2013. Gross sales by Recording Studios and from Radio & TV Broadcasting companies recorded the largest declines of 54.9 per cent and 34.3 per cent, respectively (Table 18.1).

Cinema, Theatre, Video Production and Motion Picture

Gross sales to ***Theatrical Producers & Entertainment Services*** declined by 18.6 per cent relative to 2012 (see Table 18.1). Thirty-four plays and dramatic productions opened in 2013 compared with 33 productions in 2012 (Table 18.2).

Motion Picture Receipts

For the 2012/2013 Financial Year[13], total revenue earned by the Palace Amusement Company amounted to $1 173.8 million, an increase of $57.6 million compared with the similar period of 2012 (Table 18.3). This improved out-turn reflected higher revenues from all categories, with the exception of Other Activities which recorded a decline of $20.3 million. The highest increase in revenues were from Screen Advertising and Box Office Receipts which grew by $42.1 million and $21.9 million, respectively. Increased revenue of $11.1 million and $2.5 million were recorded for film rental and confectionary sales.

Broadcasting

Financial Compliance

All Subscriber Television (STV) operators are required to pay an annual licence fee to the BCJ, equivalent to 5.0 per cent of gross subscription income earned. Of the 160 STV operators, 67 paid in full, 38 made partial payments and 55 were non-compliant during the year. This brought the rate of full compliance to 42.0 per cent, a 1.0 per cent decline relative to 2012, when 68 operators made full payments.

Contacts Made to the BCJ

For 2013, members of the public made 473 contacts to the Broadcasting Commission of Jamaica; 219 for the first half of the year, and 254 for July to December. This compares with 161

TABLE 18.1
PERCENTAGE CHANGE IN REAL GROSS SALES BY ENTERTAINMENT CATEGORIES 2013/2012

CATEGORIES	% CHANGE
Motion Picture Projections & Other Entertainment Services	12.2
Motion Picture & Projects	-21.2
Video Productions	-16.8
Record Production	-30.0
Recording Studios	-54.9
Radio & TV Broadcasting	-34.3
Theatrical Producers & Entertainment Services	-18.6
Cable TV Services	-2.9
Other Entertainment Products & Services	23.5
CHANGE IN TOTAL REAL GROSS SALES	5.3

Source: Compiled by the PIOJ from General Consumption Tax Data

13 The Financial Year for the Palace Amusement Company ends in June.

TABLE 18.2
SELECTED PLAYS & DRAMATIC PRODUCTIONS OPENED IN 2012, 2013

2012	2013
A Yah So Nice	2Intents (Smoker 2013)
Augus Mawnin	Alice-The Musical
Backslider (Gospel Musical)	Anancy Chaptaz: Winners' Circle
Bedward	Baby With The Bathwater
Bellywoman Bangarang	Bang Belly Hotel
Bitter Sweet Love	Blood Wedding
Boy Blue	Breadfruit is the New Bread, Baby
Court House Drama	Clues
Dangerous Ambitions	Departure in the Dark
De Business Plan	Eight By Ten
De Wedding Scamma	Imagine
Get Your Black Hands Of Her	In the Red & Brown Water
Glass Slippaz	Internet Affair
God?s Way 2: Carlton's Redemption	Jamaica Farewell
Hercules (Musical)	Jonkanoo Jamboree
I Fi I (Smoker 2012)	Ladies of the Night
Old Story Time	Man Talk
Jamaica 50 2 Rhatid	My God Don't Wear Pyjamas
Krosses & Scandal	Osisi Abathathu (Tallawah Drama Festival)
Mr. & Mrs. Blacke	Passa Passa Tun Up
Old Story Time	Risque
Ova Mi Dead Body 2	Skoolaz (LTM Pantomime 2012/2013)
Scandal	Taboo
Single Mother	The Golden Macca Fat (LTM Pantomime 2013/2014)
Sins of the Father	Thicker Than Water
Skoolaz (Pantomime 2012/2013)	To The Finish
Stanley, Fay, Pularchie & P	Two Can Play
The Messiah	Wine and Roses
The New Breadfruit Kingdom	When the Cat's Away
The Politicians	The Trouble with the Johnsons!
Where is my Father?	Brother Scamp and Other Tales (Story Theatre for Young People
Who a Di Don?	Embassy Saga
Yard 2012	Cinderella's Chronicles
	Choose to be Fee - It's the Year of Jubilee

Source: Friday Editions of the Jamaica Gleaner, jamaicanplays.com and susumba.com

and 212 contacts for January to June and July to September, respectively, in 2012 (Table 18.4). The most frequent contacts made to the BCJ during the year were to request information (154); and to seek clarity on operational (145) and broadcast rights (39) issues.

Programming Content Compliance

The BCJ received 33 complaints from members of the public, a decline of 6 relative to 2012. The most frequent complaints were about the transmission of songs with violent and sexually suggestive lyrics; and the transmission of expletives.

Notices of Breach

Sixty-three notices of breach were issued to broadcast licensees (broadcast radio, broadcast television and subscriber television licensees) compared with 10 in 2012. The highest number of breaches was issued during the third quarter of the year (Figure 18C). Of the total notices issued, 35 were for breaches of the Copyright Act; 15 for the contravention of content standards; 12 for failure to maintain technical standards; and 1 for an unauthorized STV operation.

TABLE 18.3
SELECTED INDICATORS FROM PALACE AMUSEMENT'S COMPANY REVENUES, 2012/2013
$MILLION

	Carib Cinema		Palace Cineplex		Palace Multiplex		Odeon Cineplex		Film Activities		Screen Advertising		Total	
	2011 /2012	2012 /2013	2011 /2012	2012 /2013	2011 /2012	2012 /2013	2011 /2012	2012 /2013	2011 /2012	2012 /2013	2011 /2012	2012 /2013	2011 /2012	2012 /2013
Box Office Receipts	276.8	278.8	88.8	96.6	114.7	128.1	34.0	32.7	-	-	-	-	514.3	536.2
Confectionary Sales	111.7	113.4	38.0	38.3	44.4	45.7	13.6	12.9	-	-	-	-	207.8	210.3
Film Rental	-	-	-	-	-	-	-	-	340.8	351.9	-	-	340.8	351.9
Screen Advertising	-	20.1	-	8.4	-	11.8	-	3.4	-	-	28.0	26.4	28.0	70.1
Other Activities	12.3	2.9	6.5	1.6	5.1	0.6	1.7	0.3	-	-	-	-	25.6	5.3
Total Revenues	-	-	-	-	-	-	-	-	-	-	-	-	1 116.5	1 173.8

Source: Extract from the 2012/2013 Financial Statements of the Palace Amusement Company

Amusement Licences

The total number of licences issued by parish councils for amusement activities amounted to 22 929, an increase of 2 085 relative to 2012. This out-turn reflected higher issuance of licences by eight parish councils. The councils which accounted for the highest increases were Clarendon (up 1 549); Manchester (up 644); Portland (up 422); and St. James (up 275). Fewer licences were issued by six local authorities, with St. Mary and St. Catherine accounting for the largest absolute declines of 919 and 206, respectively, in licences issued.

Revenue collected from licences issued amounted to $94 362.4 million. This compared with $84 634.1 million which was collected in 2012, reflecting higher collection from eleven parish councils. The most notable increases were for the Kingston and St. Andrew Corporation (KSAC) (up $3.3 million); Manchester (up $2.7 million); Portland (up $2.5 million); and St. James (up $1.4 million). The largest declines in revenue intake were recorded by St. Mary (down $2.6 million) and St. Catherine (down $0.9 million).

The movements in the number of licences issued and the revenue collected by parish councils in 2013, relative to 2012, were associated with differences in the number and types of events held and the associated charges for licences granted.

Jamaica Association of Composers, Authors and Publishers (JACAP)[14]

For 2013, total royalties disbursed by JACAP amounted to $13.6 million, $1.0 million higher than the amount paid out in 2012 (Table 18.6). This increase reflected higher local and overseas royalty distribution which grew by $0.7 million and $0.3 million, respectively. Overseas royalties collected in 2013 by JACAP on behalf of its members grew by $6.1 million to $13.4 million. At the end of 2013, JACAP's membership was 3 227 persons.

JACAP collects and disburses royalty payments on behalf of its members only on active repertoires, that is, works that are actually used by the licensees (music users). Administrative costs are covered before revenue is distributed, with payments made twice in a current year, for the preceding year.

TABLE 18.4
NATURE & TOTAL NUMBER OF CONTACTS MADE TO THE BROADCASTING COMMISSION 2012, 2013

		2013	
	Jan-June	**July-Dec**	**Total**
Information Requested	86	68	154
Licenses Application Process	9	18	27
Zoning and Contact Information for STV	5	-	5
Complaints received and investigated	30	27	57
STV Licensees pegging subscriber fee to the value of the United States Dollar	2	-	2
Poor reception from Stars Cable	10	7	17
Other operational issues	77	68	145
STVO loss of service redress	-	3	3
Exclusive broadcast rights issues	-	39	39
Information about audience share for the broadcast media	-	3	3
Flow's removal of the fox movie channel	-	2	2
Digital Switchover/Digital Cable Box Issues	-	13	13
Difficulty accessing BBC	-	6	6
Total	**219**	**254**	**473**
		2012	
	Jan-June	July-Dec	Total
Information Requested	101	68	169
STV service issues related to the passage of Hurricane Sandy	-	4	4
Zoning & Contact Information	7	7	14
Complaints received and investigated	21	25	46
Licensees' Application Process	20	9	29
Regulation of STV customers fees by Commission	2	-	2
Legality of Community Stations airing advertisements	-	2	2
Queries about Converter Box	2	-	2
Regulating of the Internet by the Commission	2	-	2
Customer Service Issues Flow	6	2	8
Broadcast Rights of the 2012 Olympics	-	7	7
Difficulty Accessing TV Station (CVM)	-	18	18
CVM's Coverage of the 2012 Olympics	-	60	60
STVO transmitting channel in Spanish	-	4	4
STVO switching channels without notice	-	2	2
Digital Switchover	-	2	2
Rebate Issues	-	2	2
Total	**161**	**212**	**373**

Source: Broadcasting Commission of Jamaica

14 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.

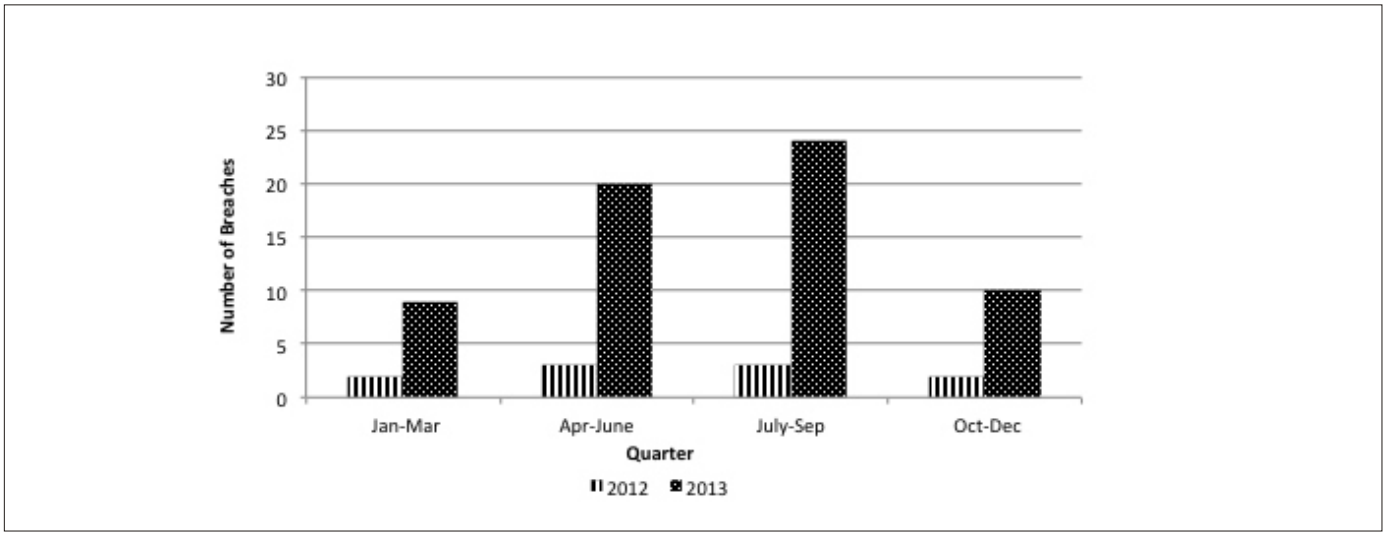

FIGURE 18C: NOTICES OF BREACH ISSUED TO LICENCE OPERATORS BY THE BCJ, 2012, 2013

Jamaica Music Society (JAMMS)

JAMMS was established in 2006 as a Licensing Agency[15] and Collecting Society to administer rights on behalf of Record Companies and Record Producers who own the copyright in recorded music, and is a members-based, not-for-profit organization. The main role of the organization is to ensure that all music users engaged in 'playing music publicly' or broadcasting music, are duly authorized, by obtaining the relevant Licence/Permit from JAMMS. Under Copyright Law, if recorded music is played in public (i.e., outside the domestic circle), for instance, at a place of business or event, then authorization must be sought from the owners of the copyright or their agents.

During 2013, a total of $21.1 million was collected locally in permit fees from entities which used music protected by JAMMS licences. This represented an increase of $14.7 million relative to 2012. Disaggregation of the fees collected by JAMMS from music users in 2013 is presented in Figure 18D.Income collected from overseas royalty payments totalled $2.2 million, which was $0.1 million below the amount received in 2012. Total royalties paid out by JAMMS to its membership amounted to $13.5 million compared with $12.0 million in 2012. Of this amount, local and overseas royalty pay-outs accounted for 60.0 per cent and 40.0 per cent, respectively. Of the total payments made in 2012, local and overseas royalty payments accounted for 39.3 per cent and 60.7 per cent, respectively.

Financing to the Entertainment Industry

The outstanding stock of loans & advances to the Entertainment industry at Commercial Banks and institutions

TABLE 18.5
AMUSEMENT LICENCES GRANTED & REVENUE COLLECTED 2009–2013

	Nunmer of Licences Issued					Revenue Collected ('$000)				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
Clarendon	1 734	1 536	1 592	2 134	3 683	3 168.5	3 395.0	4 722.4	4 866.8	5 162.6
KSAC	4 499	2 229	5 817	6 487	6 720	17 135.0	15 203.6	23 410.0	27 424.3	30 737.1
Manchester	1 260	919	432	152	796	3 150.0	2 298.0	1 080.0	0 361.0	3 014.8
St. Elizabeth	1 606	2 001	2 279	2 625	2 547	6 631.0	7 658.5	8 667.3	9 307.8	9 787.4
Hanover	337	247	222	109	355	1 138.0	0 940.3	1 189.5	1 003.5	1 160.5
St. Catherine	1 706	845	1 336	2 158	1 952	4 502.5	3 022.4	4 732.2	8 328.6	7 468.8
St. Thomas	1 139	1 430	1 530	1 419	1 326	3 156.5	4 048.0	4 711.9	4 008.3	4 774.9
Westmoreland	1 310	1 158	454	860	1 034	8 030.9	8 440.4	4 334.4	6 883.6	7 731.8
Trelawny	710	588	741	836	733	1 341.0	1 697.5	2 211.8	2 506.5	2 611.0
Portland	249	340	548	439	861	1 594.7	2 246.6	2 953.0	2 663.7	5 127.1
St. Ann	655	581	645	893	793	4 084.0	3 391.5	4 089.6	6 724.8	6 519.5
St. Mary	1 036	1 059	1 414	1 712	793	2 710.4	2 933.9	8 325.7	5 820.1	3 186.0
St. James	900	795	778	624	899	3 058.4	3 094.3	3 502.4	3 188.4	4 583.3
Portmore	472	278	331	396	437	1 332.1	910.00	1 194.0	1 547.0	2 497.7
TOTAL	**17 613**	**14 006**	**18 119**	**20 844**	**22 929**	**61 033.0**	**59 280.0**	**75 124.0**	**84 634.1**	**94 362.4**

Source: Compiled by the PIOJ with data received from Parish Councils

15 A licensing body is a society or other organization with responsibility for the negotiation or granting (either as owner or prospective owner of copyright, or as an agent) of licences, and the granting of licences covering the works of one or more authors

TABLE 18.6
PAYMENT OF ROYALTIES DISBURSED BY JACAP, 2012 - 2013
$MILLION

Total Monies Disbursed by JACAP	2012	2013[p]	Abs Change	% Change
Local Distribution	1.9	2.6	0.7	35.6
Overseas Distribution (Gross)	10.7	11.0	0.3	2.8
Total	12.6	13.6	1.0	7.8
Incoming Royalties to JACAP				
Overseas Net	7.3	13.4	6.1	83.9

p - preliminary

Source: Jamaica Association of Composers, Authors and Publishers

licensed under the Financial Institutions Act (FIA), at the end of December 2013 amounted to $2 103.3 million. This represented an increase of $970.9 million compared with 2012 (Figure 18E). The growth in the loan portfolio to the industry reflected higher loans by Commercial Banks (up $913.3 million to $2 045.7 million); and FIA institutions. Disbursements by FIA institutions amounted to $57.6 million. No loans were issued to the entertainment industry by these institutions in 2012.

SPORTING & OTHER RECREATIONAL ACTIVITIES

Government Funding to Sporting Activities

For 2013, total income for the SDF amounted to $581.1 million, an increase of $42.6 million relative to 2012. The higher out-turn reflected increased revenue from all income categories. Gaming proceeds at $566.1 million accounted for 97.4 per cent of total income, and grew by $34.4 million relative to the previous year. The higher revenue from this category reflected increased sales of gaming products, due, in part, to the increased number of gaming days relative to 2012[16]. Investment income increased by $6.2 million to $11.8 million, as higher gaming proceeds and delays in the implementation of infrastructure projects[17], resulted in investment funds being held for longer periods. Other Income grew by $2.1 million to $3.3 million compared with 2012. The growth in gross income facilitated the approval of additional grants to National Sporting Associations during the year.

Expenditure on sports infrastructure projects funded by the SDF increased by $27.5 million to $71.7 million and reflected higher expenditure in four categories (Table 18.7). However, the increase in expenditure was below the budgeted amount of $236.3 million, as some major projects slated for implementation were not completed during the year due to the

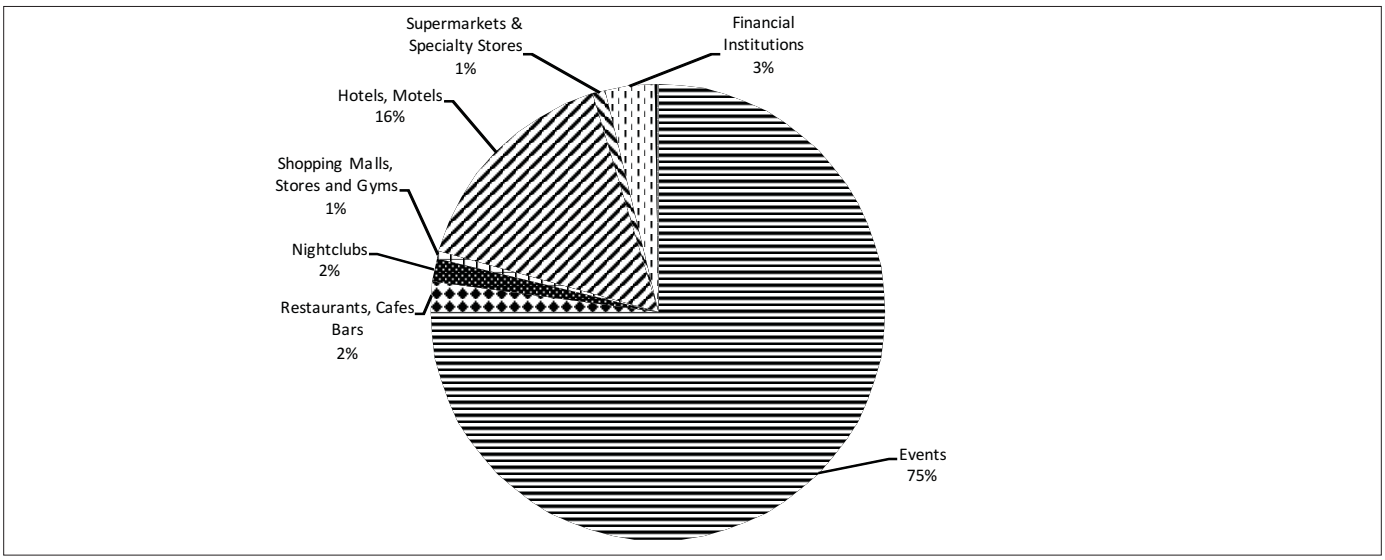

FIGURE 18D: FEES COLLECTED FROM LICENCES/PERMITS ISSUED BY JAMMS IN 2013

16 The number of gaming days increased by 59 in 2013, with the introduction of gaming on Sundays and Public Holidays, excluding Good Friday and Christmas Day.

17 Implementation of sport infrastructure projects and associated expenditure was hampered in 2012 by procurement challenges stemming from the absence of appropriate sporting categories on the National Contracts Commission List. The absence of the relevant categories resulted in delays in selecting qualified and experienced contractors to implement infrastructure projects. This challenge persisted in 2013. Representations have been made to the Ministry of Finance & Planning by the SDF regarding suggested amendments to the guidelines to facilitate the effective and efficient implementation of projects going forward.

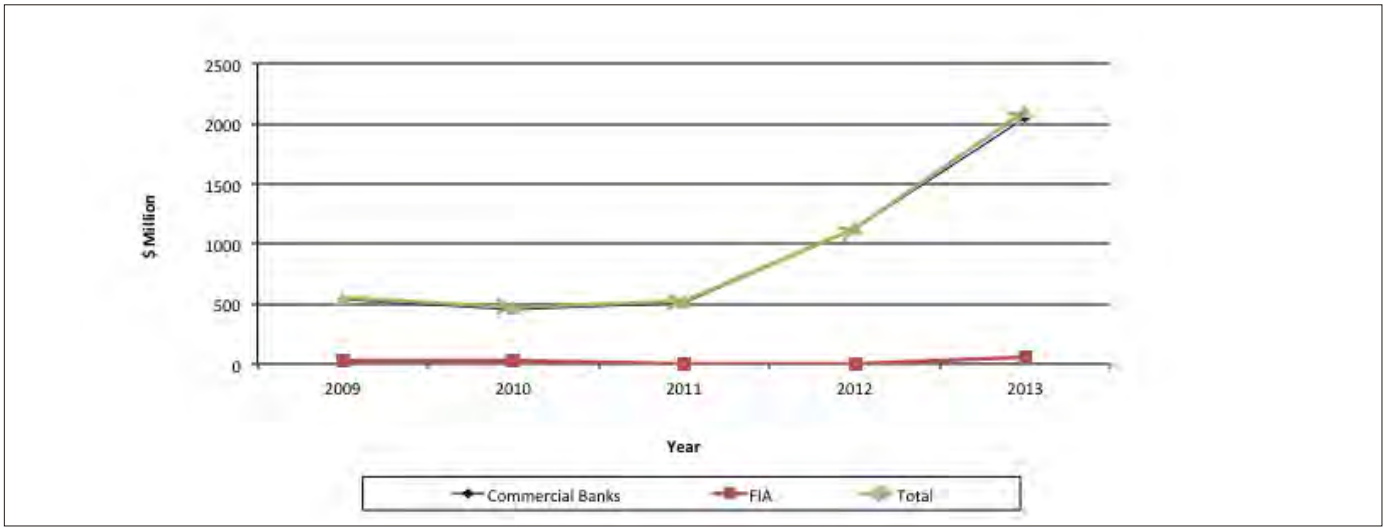

FIGURE 18E: STOCK OF LOANS AND ADVANCES TO THE ENTERTAINMENT INDUSTRY, 2009–2013

procurement challenges highlighted. Three categories recorded lower expenditure.

The projects implemented included:

- the construction of multipurpose courts at 11 locations, including four schools amounting to $33.3 million, an increase of $22.6 million
- the rehabilitation of playfields at four locations, including three schools amounting to $17.3 million, an increase of $6.2 million
- commencement of the replacement of filters, valves and fittings at the National Stadium Pool which amounted to $11.4 million
- repairs to Clubhouses, Complexes and Lighting fixtures at three locations including repairs to the roof of the gymnasium at the G.C. Foster College and lights at the Prison Oval complex costing $6.5 million, an increase of $5.1 million
- fencing at three sites (Nelson Road, Payne Avenue and Exchange Primary) which amounted to $1.8 million, a decline of $2.2 million.

Total grant funding to sporting associations totalled $294.2 million in 2013, an increase of $75.8 million relative to 2012. This increase stemmed from higher allocations to National Associations and Government Agencies (Table 18.8).

National sporting associations received grant funding of $247.8 million compared with $172.8 million in 2012, reflecting higher disbursements to 19 associations. The highest allocations for 2013 were to four associations, which combined, accounted for 73.4 per cent of the total allocation to sporting associations. These beneficiaries were:

TABLE 18.7
PROJECTS FUNDED BY SDF 2009–2013
$MILLION

	2009	2010	2011	2012	2013	Absolute Change	% Change
Expenditure on Projects							
Courts	46.1	14.7	20.3	10.6	33.3	22.6	-47.6
Fields	26.0	27.0	6.9	11.2	17.3	6.2	62.1
Fences/Walls	12.5	15.9	2.3	4.0	1.8	-2.2	72.4
Clubhouses, Complexes & Lighting	41.5	30.2	10.2	1.4	6.5	5.1	-86.6
Equipment, Signs & Other Projects	3.5	1.0	2.1	2.0	1.4	-0.5	-6.1
Running Tracks	0.0	0.0	109.5	15.0	0.0	-15.0	-86.3
Filters & Fittings	0.0	0.0	0.0	0.0	11.4	11.4	n/a
TOTAL	**130.4**	**88.8**	**151.3**	**44.1**	**71.7**	**27.5**	**-70.8**
Number of Projects	2009	2010	2011	2012	2013		
Courts	36.0	15.0	8.0	4.0	11.0		
Fields	25.0	11.0	2.0	3.0	4.0		
Fences/Walls	34.0	18.0	2.0	3.0	3.0		
Clubhouses, Complexes, Lighting	15.0	13.0	4.0	1.0	3.0		
Signs & Equipment	0.0	4.0	2.0		1.0		
Running Tracks	0.0	0.0	3.0	2.0			
Filters & Fittings					1.0		
TOTAL	**123.0**	**64.0**	**21.0**	**13.0**	**23.0**		

Source: Sports Development Foundation Limited

– the Jamaica Football Federation (JFF), which received the highest allocation of $137.5 million, an increase of $77.9 million compared to 2012. Funding was provided to support the national team's campaign to qualify for the 2014 World Cup

– the Jamaica Athletics Administrative Association (JAAA), which received financial support of $18.7 million, $7.7 million higher than the allocation for 2012. This facilitated Jamaica's participation at the 2013 Carifta Track and Field Championships and the 2013 IAAF World Championships

– the Jamaica Cricket Association (JCA), which received $14.6 million in assistance, $1.1 million higher than in 2012. This facilitated the preparation of teams prior to their participation in regional competitions

– the Jamaica Netball Association (JNA), which received an allocation of $11.2 million, a decline of $1.4 million compared with the previous year. This allocation facilitated funding for the Tri-Nation series matches against England, in preparing the Sunshine Girls to participate in the World Youth Netball Championships.

Twenty-three associations received lower allocations. The largest absolute decline of $3.4 million in disbursements was for the Jamaica Visually Impaired Cricket Association, which received no allocation in 2013 (see Table 18.8).

Government Agencies received funding of $46.4 million, an increase $0.8 million relative to 2012. This reflected higher disbursements to two agencies — Institute of Sport (up $0.5 million) and Independence Park Limited (up $0.3 million); and disbursements of $8.8 million and $17.0 million to G.C. Foster College and the Social Development Commission, the same allocations received in 2012 (see Table 18.8).

Netball

During 2013, the national netball team hosted two international tournaments: one against England at the senior level; and a tri-nation tournament against England and Trinidad and Tobago at the under-21 level. Expenditure associated with the hosting of these events amounted to $10.2 million, while gate receipts generated was $2.1 million. Attendance at both events amounted to approximately 3 150 persons.

The national team embarked on two overseas tours. The under-21 team journeyed to Glasgow, Scotland to participate in the World Youth Netball Championship in August, while the senior team competed in the Fast 5 Series in New Zealand in November. Expenditure associated with the teams' overseas competitions amounted to $9.9 million. This was $3.6 million higher than the cost to facilitate overseas tours in 2012.

Seven hundred local league games were held which featured matches among local clubs. Gate receipts associated with these games amounted to $0.2 million, which was below associated expenditure of $6.5 million. Gate receipts from these games in 2012 was $0.2 million, which fell below expenditure of $7.5 million. Approximately 1 400 supporters attended these matches, 200 more than the number of persons which supported netball at the local league level in 2012.

To assist with their operations, the JNA received sponsorships (cash and non-cash) valuing $42.1 million in 2013, which was $3.5 million higher than the total value of sponsorships received in 2012.

Cricket[18]

For 2013, the JCA received $60.6 million in sponsorships, which facilitated the organization's thrust to broaden the reach of the sport throughout the year.

Total income received from local matches amounted to $63.7 million, with associated expenditure of $59.9 million. Additional income of $11.7 million was received from the Caribbean Premier League, while expenditure associated with the national team's participation in the league amounted to $11.5 million. Jamaica also hosted a regional match, from which gate receipts of $0.2 million were collected.

Track and Field

Gross Income for the Jamaica Athletics Administrative Association (JAAA) for the 2012/2013 Financial Year[19] was $157.0 million, an increase of $16.9 million relative to 2011/2012 (Table 18.9). This increase was due to growth in three categories of income, which outweighed the declines recorded for the remaining categories. The most substantive increase in income for 2012/2013 was from the Gear Sponsor, Puma, from which revenue of $98.5 million was received compared with $59.8 million in 2011/2012.

The largest fall-off in income was for gate receipts, which declined by $15.2 million to $9.1 million. Other declines in income included lower receipts from Other Sponsors and SDF grants, evidenced by downturns of $1.8 million and $5.2 million, respectively.

Expenditure for the 2012/2013 Financial Year amounted to $167.5 million, an increase of $59.2 million compared with the previous financial year (Table 18.10). This out-turn reflected higher expenditure in all but four categories. Spending on the purchasing of Team Gear (up $28.1 million); International (up $20.7 million) and Regional Competitions (up $4.6 million); and the National Championships (up $0.2 million) together accounted for 77.0 per cent of total expenditure. A reduction in expenditure on local competitions (down $2.5 million) recorded the largest absolute decline relative to the previous financial year.

Football

In January 2013, the restructuring of the country's football programme was approved by the Jamaica Football Federation's (JFF) Board of Directors to include inter alia, the implementation of club licensing and coaching licensing systems.

– Coach Licensing System – as part of the restructuring of the national programme, a coaching licensing system was implemented in September. The new system requires all coaches to obtain licences to practise in Jamaica at any level. To receive a licence, interested persons are required to acquire the appropriate coaching certificate; enrol in refresher courses; be actively coaching and pay an annual fee amongst other requirements. The introduction of this system locally coin-

18 No data were received for 2012.
19 The JAAA'S Financial Year begins on October 1 and ends on September 30.

TABLE 18.8
SPORTS DEVELOPMENT FOUNDATION DISTRIBUTION OF GRANTS, 2012–2013
($MILLION)

ASSOCIATIONS	2012	2013	Abs. Change	% Change
Amateur Swimming Association	4.3	2.4	-1.9	-43.7
Association of Sports Medicine	1.9	1.0	-0.9	-47.4
Equestrian Federation	1.7	0.6	-1.1	-64.3
IAAF High Performance Centre	1.0	1.0	0.1	7.5
Jamaica Athletic Administrative Association	11.0	18.7	7.7	70.3
Jamaica Amateur Basketball Association	5.5	4.5	-1.0	-18.0
Jamaica Amateur Bodybuilding Association	0.9	0.8	-0.1	-10.1
Jamaica Amateur Gymnastics Association	1.6	0.0	-1.6	-100.0
Jamaica Amateur Softball Association	0.3	0.0	-0.3	-100.0
Jamaica Badminton Association	3.4	4.4	1.0	31.1
Jamaica Baseball Association	0.0		0.0	n/a
Jamaica Bobsleigh Federation	0.0	0.8	0.8	n/a
Jamaica Boxing Board of Control	1.7	2.0	0.4	21.2
Jamaica Chess Federation	1.8	3.5	1.7	99.9
Jamaica Cricket Association	13.5	14.6	1.1	8.0
Jamaica Cricket Umpires Association	0.6	0.0	-0.6	-100.0
Jamaica Cycling Federation	1.7	2.7	1.0	59.2
Jamaica Deaf Sports Association	2.2	1.3	-0.9	-41.4
Jamaica Football Federation	59.6	137.5	77.9	130.6
Jamaica Golf Association	2.8	1.9	-0.8	-29.9
Jamaica Hockey Federation	4.6	2.8	-1.8	-39.0
Jamaica Intercollegiate Association	2.3	2.8	0.5	21.7
Jamaica Netball Association	12.6	11.2	-1.4	-11.0
Jamaica Olympic Association	1.6	0.0	-1.6	-100.0
Jamaica Paralympic Association	3.4	2.0	-1.4	-41.7
Jamaica Physical Education Association	0.1	0.0	-0.1	-100.0
Jamaica Race Car Drivers/Motoring Club	0.7	0.5	-0.2	-25.6
Jamaica Racing Commission	0.0		0.0	n/a
Jamaica Rifle Association	0.0	0.5	0.5	n/a
Jamaica Rugby League	1.3	1.6	0.3	20.8
Jamaica Rugby Union	1.2	2.4	1.2	99.2
Jamaica Seido Karate Association	0.9	0.8	-0.1	-13.0
Jamaica Skeet Club	0.8	0.0	-0.8	-100.0
Jamaica Ski Federation	1.2	0.0	-1.2	-100.0
Jamaica Squash Association	1.9	1.8	-0.1	-4.9
Jamaica Surfing Association	1.2	1.5	0.3	25.0
Jamaica Table Tennis Association	2.9	4.7	1.8	61.8
Jamaica Triathlon Association	0.5	0.3	-0.2	-40.0
Jamaica Visually Impaired Cricket Association	3.4	0.0	-3.4	-100.0
Jamaica Volleyball Association	3.7	3.0	-0.7	-19.2
Jamaica Yachting Association	0.0	0.0	0.0	n/a
Multicare Foundation	2.6	2.8	0.2	7.5
National Domino Bodies	2.1	0.0	-2.1	-100.0
Special Olympics of Jamaica	3.8	5.5	1.7	46.4
Tae-Kwon Do Association	0.6	1.4	0.8	146.1
Tennis Jamaica	4.2	4.5	0.3	6.6
Total National Associations	172.8	247.8	75.0	43.4
GOVERNMENT AGENCIES				
G.C. Foster College	8.8	8.8	0.0	0.0
Independence Park Limited	3.4	3.7	0.3	9.0
Institute of Sport	16.5	17.0	0.5	3.0
Social Development Commission	17.0	17.0	0.0	0.0
Total Government Agencies	45.6	46.4	0.8	1.8
TOTAL DISBURSEMENTS (ASSOCIATIONS & GOVERNMENT)	**218.4**	**294.2**	**75.8**	**34.7**

Source: Sports Development Foundation Limited

TABLE18.9
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION INCOME, 2008/2009 – 2012/2013
J$ '000

Income	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2012/2013/2011/2012 Absolute Change	% Change
Gear Sponsor	46 879.4	53 976.3	51 484.1	59 755.5	98 477.3	38 721.8	64.8
IAAF/NACAC Grants	5 917.8	2 331.5	0.0	771.3	0.0	-771.3	-100.0
SDF Grants	21 811.9	12 896.4	11 700.0	18 266.2	16 431.5	-1 834.7	-10.0
JOA Grant	0.0	1 342.7	102.7	0.0	0.0	0.0	n/a
Other Sponsors	20 630.6	16 114.0	17 453.2	32 612.9	27 399.1	-5 213.8	-16.0
Gate / Programme Receipts	8 153.6	2 110.6	11 862.9	24 246.4	9 074.3	-15 172.1	-62.6
Broadcast Rights	2 208.7	0.0	2 420.0	537.3	1 300.0	762.7	142.0
Returns from meets	0.0	0.0	230.2	813.5	2 461.8	1 648.2	202.6
Other Income	2 402.8	6 372.1	1 064.1	3 095.9	1 892.6	-1 203.3	-38.9
Total	**108 004.8**	**95 143.6**	**96 317.2**	**140 099.0**	**157 036.6**	**16 937.6**	**12.1**

Source: Extracted from the Annual Report of the Jamaica Athletics Administrative Association

cided with the inception of the CONCACAF Coach Licensing System, which came into effect during August 2013.

– Club Licensing System – when implemented, the Club Licensing System will mandate, inter alia, the alignment of clubs' constitutions with those of the JFF and the International Federation of Association Football (FIFA); certification of club officials; and the mandatory implementation of a grassroots programme.

A critical premise for the restructuring is that Jamaica lacks sufficient technical and financial resources to play its current level of football efficiently and productively, therefore fundamental changes are necessary. In keeping with this development, a 2022 Technical & Development Plan to further the development of football locally was completed in August 2013. The plan outlines the steps to achieve the stated vision that in 2022, Jamaica's football would have achieved international success and recognition facilitated by a financially strong and stable JFF.

Two hundred and forty-four match officials were registered during 2013 by the JFF's licensing committee, bringing the total number of referees to 290. The average age for the present referee population was 33.9 years.

Jamaica's football programme received a six-year (2013-2018) sponsorship from Coca-Cola through local distributor Wisynco to provide support to all national teams. Sponsorship was also received to facilitate the refurbishing of the players' residence; football centre, and the JFF's headquarters. A renewed commitment from an existing sponsor to facilitate the operations of the coaching school was also received during the year.

TABLE 18.10
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION EXPENDITURE, 2008/2009 – 2012/2013
$'000

Expenditure	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2012/2013/2011/2012 Abs. Change	% Change
Athletes Assistance	8 059.0	5 502.2	4 797.1	5 490.8	9 096.4	3 605.7	65.7
National Championships	10 612.3	11 387.9	12 895.1	27 059.0	27 250.0	191.0	0.7
Secretariat Office	5 764.6	5 001.7	4 567.4	5 987.6	7 616.8	1 629.2	27.2
Competitions:							
Local	17 656.8	15 713.4	9 128.8	6 376.7	3 884.8	-2 491.9	-39.1
Regional	24 434.6	24 671.2	11 878.8	24 104.1	28 710.5	4 606.4	19.1
International	20 306.7	15 072.6	37 814.9	14 153.6	34 877.5	20 723.9	146.4
Cross Country-NACAC	1 477.4	1 906.9	604.7	820.6	629.1	-191.5	-23.3
London Olympics	-	-	-	833.0	18.0	-815.0	-97.8
Camps	0.0	511.0	499.5	0.0	0.0	n/a	n/a
Seminars / Training	569.8	763.2	584.1	279.6	723.0	443.4	158.6
Other Expenses	13 742.3	11 318.6	8 934.1	12 262.5	15 708.1	3 445.6	28.1
Puma Team Gear (Competition & Training)	0.0	0.0	0.0	10 000.0	38 100.0	28 100.0	281.0
JAAA Special Project	747.2	270.1	779.1	918.6	895.3	-23.3	-2.5
Total Expenditure	103 370.7	92 118.8	92 483.6	108 286.1	167 509.5	59 223.4	17.1

Source: Extracted from the Annual Report of the Jamaica Athletics Administrative Association

BOX 1: STATUS OF SPORTS PROJECTS IN SUGAR DEVELOPMENT AREAS

Parish	Location	Field	Court	Fence	Building
Clarendon	Toll Gate	completed	completed	perimeter fencing has started	completed
	Crofts Hill	in progress	completed	completed	
St. Thomas	Lyssons	completed	completed	completed	to be implemented
Hanover	Logwood	completed	completed	completed	
	Pell River				completed
St. Catherine	Lluidasvale	completed	incomplete	completed	
	Marlie Acres	completed	completed	completed	
	Dunbeholden	completed	completed	completed	completed
	Lime Tree Gove	completed	completed	completed	completed
	Chedwin Gardens	98% completed	completed	completed	completed
	Knollis	in progress	completed		
Trelawny	Bunkers Hill	in progress	completed	completed	90% complete
Westmoreland	Delveland	completed		completed	
St. Elizabeth	New Market	completed and handed over		completed and handed over	
	Elim	in progress	in progress		to be implemented

Source: Sports Development Foundation

Futsal[20] was formally introduced in 2013 as a part of Jamaica's national programme, with the playing of a 12-week tournament beginning in March in Treasure Beach, St. Elizabeth. To further the reach of this variant of the game locally, clinics and seminars were also held throughout the year.

Other Developments

Sports Projects – Sugar Dependent Areas[21]

During the year, significant progress was made in relation to the implementation of sports projects in Sugar Dependent Areas (Box 1). At the end of December, 35 projects were completed; two projects were near completion; six projects were in progress; one was incomplete; while two are to be implemented. Of the $213.0 million which was committed to implement all the projects, $163.2 million has been expended. The remaining amount will be used to complete outstanding projects.

OUTLOOK

For 2014, positive performance is anticipated for the RCS sub-industry, as the Other Services Industry is expected to record higher real value added. The sport industry is slated to benefit from improved administrative and technical development through grants to national sports associations; as well as enhanced sports curriculum and community sports development through grants to government agencies. It is also anticipated that the industry will benefit from the implementation of several initiatives during the year which are geared towards improving sport and entertainment infrastructure. These initiatives include:

Laying of a New Hockey Turf

This is slated for implementation in the first quarter of 2014/15 and will be facilitated through a bilateral arrangement between the Government of Jamaica and Government of Argentina. The upgraded infrastructure will facilitate Jamaica Hockey Federation's hosting of international tournaments, and provide local players with the opportunity to build their talent base and showcase their skills at the highest level.

Upgrading of Performing Arts and Entertainment Facilities

A joint project between the Ministry of Education and the Ministry of Tourism & Entertainment is slated for implementation with two key objectives: i) upgrading of the production and technical capabilities of existing facilities used as performing arts and entertainment venues such as school auditoriums; and ii) provision of development opportunities to students pursuing careers in Theatre Arts and Stage Craft as part of the CSEC curriculum. The Ministry of Education is providing technical expertise. Two rural schools and two urban schools are to benefit in the first tranche, to be implemented in the beginning of the 2014/2015 school year.

Installation of Flood Lights at Sabina Park

The Government of India has committed US$2.1 million towards funding for the installation of lights at Sabina Park. The project which is slated for implementation in 2014 will provide significant opportunities for cricket administrators to attract teams and clubs to the region. The lights will facilitate night matches and allow Jamaica to benefit from various tournaments, such as, the Caribbean Premier League (CPL) which is expected to be a long-term event in the Caribbean.■

20 Futsal is a variant of association football that is played on a smaller pitch and mainly played indoors. It is played between two teams of five players each, one of whom is the goalkeeper. Unlimited substitutions are permitted. Unlike some other forms of indoor football, the game is played on a hard court surface delimited by lines; walls or boards are not used. Futsal is also played with a smaller ball with less bounce than a regular football. FIFA has made a commitment to promote and structure the sport of futsal globally, by means of competitions, courses and other proactive measures, and to encourage its members to do the same.

21 In April 2012, the SDF, the Ministry of Agriculture & Fisheries and the European Union (EU) signed a Memorandum of Understanding (MOU) in the amount of $213.0 million to establish or rehabilitate sporting facilities in Sugar Dependent Areas (SDA) within the parishes of Clarendon, Hanover, St. Catherine, St. Elizabeth, St. Thomas, Trelawny and Westmoreland. The MOU was signed as part of the sugar divestment project.

CHAPTER 19

WHOLESALE & RETAIL TRADE; REPAIR AND INSTALLATION OF MACHINERY

INTRODUCTION

The Wholesale & Retail Trade; Repair & Installation of Machinery (WRTRIM) industry recorded a 0.1 per cent contraction in real value added compared with 2012. During 2013, the industry continued to be the largest, accounting for 17.6 per cent of overall Gross Domestic Product (Figure 19A). The industry was negatively impacted by:

— fiscal austerity that led to reduced government spending

— a 25.3 per cent reduction in the average Consumer Confidence index

— an 8.5 per cent reduction in the average Business Confidence index

— a contraction in the value of imports.

Further evidence of weakened domestic demand was revealed upon analysis of preliminary General Consumption Tax (GCT) data. Six of the nine goods categories surveyed recorded lower gross sales. These categories were: Food, Beverages & Tobacco; Automobiles, Commercial & Transport Equipment; Textiles, Clothing & Shoes; Furniture, Furnishings, Office Equipment & Jewellery; Electronics, Musical & Photographic Equipment; and Other Manufactured Goods. Combined, these categories accounted for 59.4 per cent of the industry's total sales.

The decline was mitigated by the impact of:

— a 4.7 per cent real increase in remittance inflows

— an estimated real growth in the related Construction industry

— higher volume (11.0 per cent) and increased real value (8.4 per cent) of Automated Banking Machine (ABM) and Point of Sale (POS) transactions

— higher average employment levels[1]

— an increase in credit to the industry and for personal consumption.

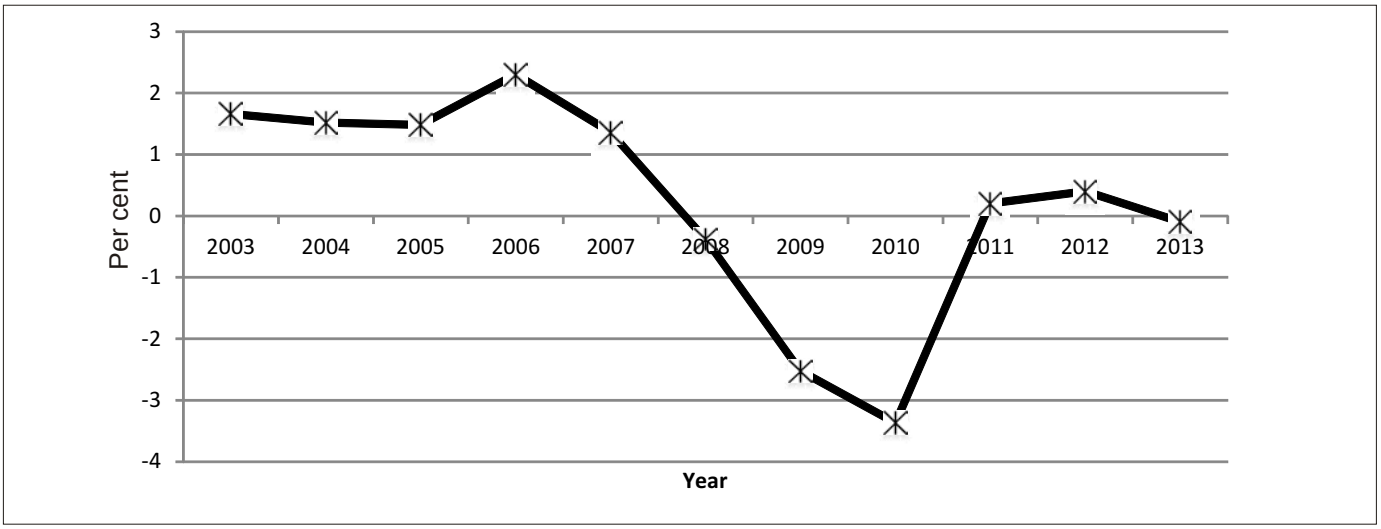

FIGURE 19A: REAL VALUE ADDED GROWTH RATE OF WHOLESALE & RETAIL TRADE; REPAIR AND INSTALLATION OF MACHINERY INDUSTRY, 2003–2013

1 For 2013, there were 5 700 more persons employed than in 2012.

TABLE 19.1
CASES INVESTIGATED AND COMPLETED BY THE FTC, 2012-2013

BREACH/INVESTIGATION	2012 RECEIVED[r]	2012 INVESTIGATED[r]	2012 RESOLVED	2013 RECEIVED	2013 INVESTIGATED	2013 RESOLVED
Abuse of Dominant Position	2	4	1	5	8	4
Misleading Advertisement	203	304	173	205	336	135
Double Ticketing	0	1	1	1	1	1
Market Restriction	0	0	0	0	0	0
Sale Above Advertised Price	0	0	0	2	2	0
Tied Selling	0	2	2	1	1	0
Other Offences Against Competition	6	33	11	3	24	4
Investigation Initiated by the FTC	0	0	0	0	0	0
Application for Authorization	0	0	0	0	0	0
Request for Information Opinion from FTC	5	6	5	10	11	7
Not Covered by the FTC	40	44	37	24	31	26
Agreements That Substantially Lessen Competition	0	0	0	3	3	0
Price Fixing	1	1	0	0	1	1
TOTAL	257	395	230	254	418	178

Source: Fair Trading Commission

POLICY AND REGULATION

Ministry of Industry, Investment & Commerce (MIIC)

The MIIC regulates the WRTRIM industry through the: Fair Trading Commission (FTC); Consumer Affairs Commission (CAC); Bureau of Standards Jamaica (BSJ) and Trade Board (TB). Some regulations governing the industry are the:

— Fair Competition Act

— Copyright Act

— Trademarks Act

— Protection of Geographical Indications Act.

One major undertaking for the ministry was the initiation of preparatory work to position the island as the fourth node in global logistics through the Global Logistics Hub initiative. This initiative is aligned with the Vision 2030 Jamaica – National Development Plan and the Strategic Growth Agenda. It seeks to capitalize on increased maritime trade activities expected with the widening of the Panama Canal. The WRTRIM industry is expected to benefit from the consumption of goods and services by the hub.

The Micro, Small and Medium-Sized Enterprises (MSMEs) and Entrepreneurship Policy — which provides a comprehensive, targeted and coherent framework to support the small business sector — was tabled and approved for implementation. This policy is expected to enhance the business environment by removing entrepreneurial impediments. WRTRIM accounts for approximately 55.7 per cent of MSME entities that will benefit from the implementation of the policy, with initial emphasis being placed on:

— identification of financing mechanisms for MSMEs

— promotion and public awareness of the policy.

Fair Trading Commission (FTC)

The FTC is governed and empowered by the Fair Competition Act (FCA). The functions of the commission include carrying out investigations in relation to the conduct of businesses and assisting in business compliance with the FCA.

The FTC received a total of 254 complaints, a decrease of 1.2 per cent compared with 2012. The majority (205) was for the breach Misleading Advertisement, followed by breaches Not Covered by the FTC (24) and Request for Information (10) {Table 19.1}. The Automobile industry accounted for 26.7 per cent of total complaints, followed by Telecommunications (23.7 per cent), Professional & Specialist Services (6.0 per cent) and Business Practices (5.3 per cent).

There were 418 cases investigated for the year, a 5.8 per cent increase compared with 2012. This total comprised 164 cases that were unresolved at the end of 2012 and 254 cases received during 2013. Misleading Advertisement accounted for 336 of the cases investigated followed by breaches Not Covered by the FTC and Other Offences Against Competition, which accounted for 31 and 24, respectively. The industries that had the most cases investigated were:

— Automobile (122 cases)

— Telecommunications (109 cases)

— Professional & Specialist Services (19 cases)

— Financial Services (19 cases).

Of the cases investigated, 42.6 per cent (178 cases) was resolved. Misleading Advertisement amounted to 135 of the cases resolved, while Not Covered by the FTC accounted for 26 cases. The Telecommunications industry accounted for 30.3 per cent of resolved cases while Automobiles and Financial Services accounted for 15.7 per cent and 5.1 per cent, respectively.

TABLE 19.2
CONSUMER AFFAIRS COMMISSION PERFORMANCE INDICATORS, 2011-2013

	2011	2012	2013	Percentage Change 2013/2012
Complaints Received	1 912	1 833	1 584	-13.6
Complaints Settled	1 716	1 606	1 345	-16.3
Consumer Advice	1 386	1 377	789	-42.7
Monies Secured ($M)	12.1	11.6	26.8	131
Surveys	50	41	30	-26.8

Source: Consumer Affairs Commission

Consumer Affairs Commission (CAC)

The CAC, through its mandate to protect the interest of consumers, conducted surveys to investigate consumer grievances and monitored price movement. Thirty surveys were conducted as follows:

— grocery – (14)

— petrol – (12)

— hardware – (3)

— school textbook – (1).

A total of 1 584 complaints were received by the CAC compared with 1 833 in the previous year (Table 19.2). Of the complaints received, 31.3 per cent was related to Electrical Equipment & Appliances, while 19.4 per cent was for Other Services and a further 10.8 per cent against Utilities (Figure 19B). The CAC settled 1 345 cases for the year, 16.3 per cent fewer compared with 2012.

There were 789 persons who sought advice from the CAC, a decline of 42.7 per cent from 2012. Compensation secured by the CAC on behalf of consumers totalled approximately $26.8 million, up from the $11.6 million secured in 2012 (see Figure 19B).

Bureau of Standards Jamaica (BSJ)

The BSJ is empowered by the Standards Act 1969, Weights & Measures Act 1976 and the Processed Food Act 1959, which allows it to carry out regulatory and compliance functions. During 2013, revisions to these Acts were prepared, with the amendments to the Standards Act being submitted to the MIIC for review.

The BSJ continued to assist food processors and exporters to be compliant with the US Food Safety Modernization Act (FSMA). The Act requires local firms to establish controls which are consistent with internationally recognized food safety practices. To this end, entities are subject to inspections by the Food & Drug Administration (FDA). The BSJ provides technical assistance to firms preparing for these FDA inspections. Of the 35 inspections conducted since the enactment of the Act, no regulatory action has been taken against any of the food facilities. The BSJ has been recognized by the FDA as an international partner that allows local food inspectors to conduct re-inspections, thereby reducing the cost to the establishment.

Other major programmes undertaken during 2013 included:

— Risk-Based Approach to Inspections of Processed Food Establishments – food factories are classified into three groups (A–low risk, B–medium risk, and

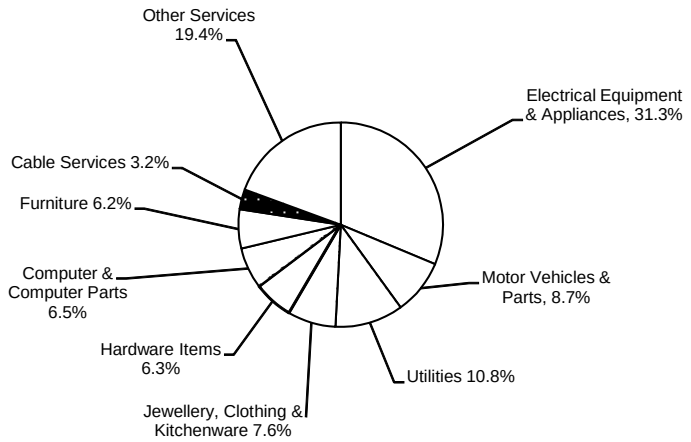

FIGURE 19B : COMPLAINTS RECEIVED BY THE CAC BY CATEGORY, 2013

TABLE 19.3
OUTPUT AND EMPLOYMENT TRENDS IN DISTRIBUTION, 2009-2013

	2009[r]	2010[r]	2011[r]	2012[r]	2013
Contribution to GDP (%)	18.5	18.1	17.9	17.7	17.7
WRTRIM Growth Rate (%)	-3.7	-3.8	0.3	-1.6	0
Overall GDP Growth (%)	-3.4	-1.4	1.4	-0.5	0.1
Persons Employed	214 675	211 350	219 033	221 350	221 525
Share of Total Employment (%)	19.1	19.3	20	20.1	20
GDP per worker (constant 2007 prices, $)	634 852	620 180	600 446	584 483	583 837

r - revised

Source: Compiled by Planning Institute of Jamaica with data from the Statistical Institute of Jamaica

C–high risk) based on type of good; intended use; product performance; and history of regulatory compliance among others. Based on the findings[2], more frequent inspections of high risk factories have led to reduced costs and efficient deployment of human resources.

— Assistance to micro, small and medium-sized enterprises (MSMEs) – the BSJ provided a 50.0 per cent discount on laboratory and other services to exporters under JAMPRO's Export Max programme. The value of the discounts given was just over $2.9 million.

— Publication of the list of registered processed food establishments –informs the public and encourages compliance; the names and food products of establishments registered under the Processed Food Act were made available via the BSJ's website.

Under the Standards Compliance Programme, the BSJ monitored imported goods and locally manufactured items, to ensure that they conformed to the relevant standards. During 2013, there were 15 182 site visits compared with 15 315 in 2012. Sites visited included:

— Ports of Entry – Kingston Wharves, Norman Manley International Airport, Sangster International Airport, Montego Bay Freeport, Seaboard Freight, bonded warehouses and cold storages

— The Domestic Market (Premises of Importers, Distributors and Manufacturers) –supermarkets, shops, wholesales, pharmacies; furniture, hardware and department stores; importers' warehouses and manufacturing plants

— Food processing establishments

— Establishments using weighing and measuring devices such as petrol pump nozzles, scales, weighbridges, tanker wagons and high volume metres.

At the ports of entry, 2 533 consignments were inspected, from which 102 were detained, resulting in a 96.0 per cent compliance rate. This was one percentage point lower than the rate recorded in 2012 when 4 675 were inspected and 138 were detained. In the domestic market, of the 102 117 goods inspected, 3 646 were withdrawn from sale compared with 143 881 inspections and 6 368 withdrawals in 2012. Goods that did not conform to the standards were either detained (at the ports of entry or at

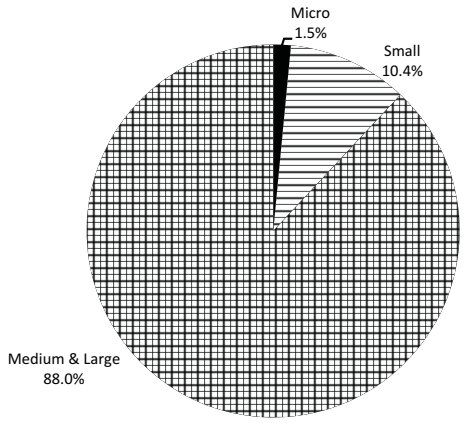

FIGURE 19C: SHARE OF TOTAL SALES BY FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2013

2 The findings as at December 2013 were as follows: A – 22.0 per cent (124 factories), B – 63.0 per cent (365 factories), and C – 15.0 per cent (88 factories).

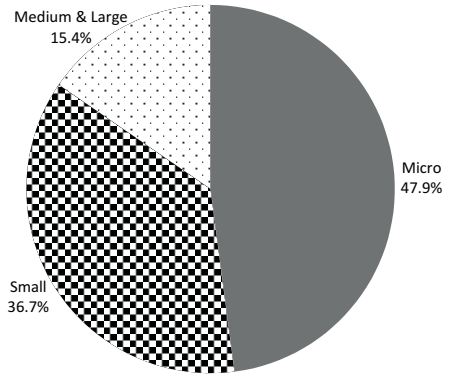

FIGURE 19D: SHARE OF FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2013

importers' warehouses) or withdrawn from sale. Items that were detained or withdrawn included:

— Garments – for the absence of labels or care instructions, material composition and country of origin

— Footwear – for no material composition, label or country of origin

— Food Items – for being labelled in a foreign language; no net weight, date mark or country of origin; product deterioration; for being expired or not being registered with the BSJ

— Appliances – for mechanical and electrical deficiencies, no country of origin

— Toilet Tissue – not conforming to the relevant standards.

PERFORMANCE

Industry Composition

Analysis of preliminary GCT data revealed that 88.0 per cent of total sales represented intake from Medium & Large firms. Additionally, 10.5 per cent and 1.5 per cent of total sales were accounted for by Small Firms and Micro Enterprises, respectively (Figure 19C). Of the total firms filing returns, 47.9 per cent was Micro Firms, 36.7 per cent Small Firms and 15.4 per cent Medium & Large Enterprises (Figure 19D).

Gross Sales of Registered Firms

Analysis of preliminary General Consumption Tax (GCT) data indicated that six of the nine goods categories recorded lower sales compared with 2012. The categories that contracted were: Food, Beverages & Tobacco; Automobiles, Commercial & Transport Equipment; Textiles, Clothing and Shoes; Furniture, Furnishings, Office Equipment & Jewellery; Electronics, Musical & Photography Equipment; and Other Manufactured Goods (Table 19.4). Combined, these categories accounted for 59.4 per cent of total sales.

Of the categories that recorded a decline in sales, the largest contraction (7.5 per cent) was for distributors of **Furniture, Furnishings, Office Equipment & Jewellery**. Consistent with this downturn were an 8.7 per cent decline in the sales for the subcategory *Furniture, Furnishings & Household Equipment* and a 3.5 per cent decrease in the *Jewellery, Watches & Clocks* subcategory.

Distributors of **Automobiles, Commercial & Transport Equipment** recorded a 5.7 per cent decline in sales and accounted for 8.9 per cent of total sales. This resulted from the performance of the *Motor Vehicles, Auto Parts & Accessories* and the *Industrial, Commercial & Agriculture Machinery* subcategories, which reported declines of 5.9 per cent and 2.9 per cent, respectively.

The **Textiles, Clothing & Shoes** category decreased by 3.0 per cent compared with 2012. Lower sales by the subcategory *Clothes* (down 10.3 per cent) outweighed respective increases of 16.2 per cent and 1.5 per cent in the *Distributors of Footwear* and *Textiles, Wearing Apparel & Footwear* subcategories.

Distributors of **Electronics, Musical & Photographic Equipment** reported a 1.6 per cent contraction in sales. This reflected lower sales in the subcategories:

— *Cellular Phones & Accessories* (down 6.0 per cent)

— *Computers & Computer Accessories* (down 2.5 per cent)

— *Office Equipment & Supplies* (down 1.6 per cent).

These decreases outweighed a 3.1 per cent increase in the sales of *Radio, Television, Electronics, Musical & Photographic Equipment*.

The largest category, ***Other Manufactured Goods***, accounted for 27.8 per cent of the industry's sales. Distributors in the category reported a 1.2 per cent decrease in gross sales; specifically, the heavily weighted *Other Manufactured Items* subcategory, which accounted for 67.0 per cent and contracted by 3.4 per cent. The out-turn for the remaining subcategories were as follows:

— *Multipurpose Store* (up 17.6 per cent)

— *In-bond Stores* (up 15.6 per cent)

— *Informal Commercial Importers* (up 15.1 per cent)

— *Athletic Sports & Recreational Activities* (up 10.1 per cent)

— *Gift Shops, Craft & Arcade Vendors* (up 8.5 per cent)

TABLE 19.4
GROWTH IN GROSS SALES IN WHOLESALE & RETAIL TRADE; REPAIR & INSTALLATION OF MACHINERY, 2012-2013

Goods Category	Sales Growth (%)		Per Cent of Sales (%)	
	2012	2013	2012	2013
Food, Beverages & Tobacco	-10.8	-1.2	15.7	16.5
Minerals, Fuels, Lubricants & Petroleum Products	4.8	1.8	27.3	26.9
Hardware, Building Supplies & Electrical Goods	5	5.9	8.5	8.6
Automobiles, Commercial & Transport Equipment	21.3	-5.7	9.1	8.9
Chemicals, Pharmaceuticals & Cosmetics	5.3	2.1	6.2	6.3
Textiles, Clothing & Shoes	1.6	-3	1.5	1.4
Furniture, Furnishings, Office Equipment & Jewellery	-26.2	-7.5	1.9	2.7
Electronics, Musical & Photographic Equipment	1	-1	2.2	2.1
Other Manufactured Goods	1.9	-1.3	29.3	27.8
TOTAL			100	100

Source: Estimated based on GCT data from Fiscal Services Limited

— *Stationery & Office Equipment, Books & Magazines* (up 3.6 per cent).

A reduction in gross sales of 1.1 per cent was registered for **Food, Beverage & Tobacco**, which accounted for 16.5 per cent of sales. Lower sales stemmed from decreases in:

— *Animal Feeds & Pet Supplies* (22.6 per cent)

— *General Groceries* (14.0 per cent)

— *Beverages* (11.0 per cent)

— *Agriculture Products, Seafood, Meat & Eggs* (4.0 per cent).

Further decline was tempered by a 16.9 per cent increase by distributors of *Baked Products & Sugar Confectionery.*

The **Hardware, Building Supplies & Electrical Goods** category reported improved sales of 6.0 per cent. Growth in the subcategories: *Lumber & Building Materials* (2.2 per cent); *General Hardware & Building Materials* (6.9 per cent); and *Electrical Equipment* (4.0 per cent) resulted in the out-turn of the category.

Distributors of **Chemicals, Pharmaceuticals & Cosmetics** registered a 2.2 per cent growth in sales. This reflected a 2.2 per cent expansion in sales by *Distributors of Chemicals, Pharmaceuticals & Cosmetics* as well as a 1.1 per cent increase in the sales of *Industrial & Non-Industrial Chemicals.*

Minerals, Fuels, Lubricants & Petroleum Products, the second largest category, accounted for 26.9 per cent of sales and recorded growth of 1.9 per cent. Consistent with the increase, all subcategories grew: *Distributors of Petroleum/Gasoline* (1.8 per cent), *Lubricant Oil & Gases* (3.5 per cent) and *Cooking Gas for Domestic & Industrial Purposes* (2.9 per cent).

Employment

Approximately 221 525 persons were employed in the WRTRIM industry, 175 more than 2012. Of the total persons employed in the industry, 44.6 per cent was male and 55.4 per cent was female compared with 45.2 per cent and 54.8 per cent, respectively, in 2012. Productivity in the industry continued to decline, evidenced by a consistent fall-off in average real value added per worker since 2009. For the year, average real value added per worker in the industry stood at $583 837.00 compared with $584 483.00 during 2012 (Table 19.3).

Credit

The stock of Loans & Advances held at Commercial Banks for Distributors increased by 9.8 per cent to $44.0 billion for calendar year 2013. In real terms, the stock to distributors was 0.3 per cent higher. Loans & Advances given for personal consumption purposes increased by 23.8 per cent relative to 2012 and amounted to $167.4 billion. This represented a real change of 13.1 per cent (Table 19.5).

An Analysis of the stock of Loans & Advances held by institutions licensed under the Financial Institutions Act revealed that loans to distributors increased to $1 323.3 million from $397.5 million in 2012, a real change of 204.1 per cent. The stock of Loans & Advances given to Consumers increased by 31.1 per cent to $2 834.6 million compared with 2012. In real terms, the stock of loans for personal consumption grew by 19.8 per cent.

Imports

The value of total merchandise imports decreased by 1.8 per cent to US$6 218.6 million. This decline resulted from a contraction in the value of imports in the following categories:

— Animal & Vegetable Oils and Fats (down 16.8 per cent)

TABLE 19.5
LOANS & ADVANCES OUTSTANDING TO FIRMS IN WRTRIM AND TO CONSUMERS, 2011-2013 ($ Million)

	2011	2012	2013	2013/2012 Per Cent Change	
				Nominal	Real
Commercial Bank Loans to:					
Distribution	30 477.3	40 054.7	43 966.8	9.8	0.3
Consumers	109 590.1	135 151.6	167 371.0	23.8	13.1
F.I.A. Institutions to:					
Distribution	278.2	397.5	1 323.3	232.9	204.1
Consumers	1 662.7	2 161.5	2 834.6	31.1	19.8

Source: Bank of Jamaica

— Chemicals (down 13.7 per cent)

— Miscellaneous Manufactured Articles (down 2.4 per cent)

— Beverages and Tobacco (down 3.0 per cent)

— Manufactured Goods (down 2.7 per cent)

— Other (down 3.3 per cent)

— Machinery and Transport Equipment (down 0.4 per cent).

Higher imports of Mineral Fuels, et cetera (up 1.5 per cent), Crude Materials (excl. fuel) {up 19.6 per cent} and Food (up 1.5 per cent) tempered the contraction of total merchandise imports.

GLOBAL WHOLESALE & RETAIL TRADE

The volume of World Trade increased by 2.9 per cent stemming from higher exports and imports, which facilitated improvement in wholesale and retail trade globally.

China's Total Retail Sales of Consumer Goods increased by 11.5 per cent in real terms compared with 2012. This reflected higher sale in rural and urban areas, up by 14.6 per cent and 12.9 per cent, respectively. By product type, increased consumption was recorded for Motor Vehicles (10.4 per cent), Furniture (21.0 per cent) and Household Appliances & Audio-Video Equipment (14.5 per cent).

In the United States of America, Personal Consumption Expenditure improved by 2.0 per cent relative to 2012. This resulted from increased expenditure on Goods and Services, which increased by 3.7 per cent and 1.2 per cent, respectively. Within the Goods category, there was a 7.1 per cent increase in spending on Durable goods and a 2.1 per cent increase in Non-durable goods.

The GDP out-turn in the United Kingdom was 1.4 per cent for 2013. This performance was spurred by the Distribution, Hotels & Restaurants industry which grew by 3.6 per cent. The Wholesale and Retail trade segment of the industry grew by 5.2 per cent.

Within the Euro area, the average volume of retail trade fell by 0.9 per cent for 2013 and 1.0 per cent in December 2013 compared with December 2012. This resulted from a 1.6 per cent contraction in Food Drinks & Tobacco and a 0.4 per cent decrease in Non-food Products. Within the zone, the largest decreases were observed in Germany (2.4 per cent) and Belgium (1.9 per cent), which outweighed increased trade in Luxembourg (up 9.4 per cent) and Poland (up 6.7 per cent).

OUTLOOK

For 2014, the WRTRIM industry is forecast to grow. This is predicated on growth in the related Construction and Agriculture industries as well as general strengthening of the economy, which should propel domestic demand. Additionally, growth in the economies of Jamaica's major trading partners should contribute to increase in the demand for local products. Improvements in the island's transport network (dredging of the Kingston Harbour and completion of the North–South link) are expected to positively contribute to activities within WRTRIM.

The BSJ will undertake the following activities:

— Achieve compliance with the US Food Safety Modernization Act (FSMA) – The Caribbean Development Bank (CDB) will partner with the BSJ to provide training in food safety principles and practices to MSMEs with a focus on the agro-processing and related sectors. It is expected that 45 employees at 15 food establishments will be impacted initially.

— Establishment of a modern packaging laboratory – With support from the CDB, the BSJ will be modernizing its packaging laboratory to fulfil its regulatory responsibilities, as well as meet the current and future needs of the packaging industry. This initiative will seek to address the issues which are affecting the packaging industry.■

CHAPTER 20

POPULATION

INTRODUCTION

Population dynamics including the growth, size, structure and distribution of a population are inextricably linked to national and global development challenges and solutions. Demographic changes are critical to informing the formulation, implementation, monitoring and evaluation of policies, plans and programmes. It is therefore imperative to integrate population variables such as fertility, mortality and migration into development planning and decision-making.

The Population Sector Plan of **Vision 2030 Jamaica – National Development Plan** focuses on having "a population which meets the sustainable development needs of the country"[1].

Based on the Vision 2030 Jamaica – Dashboard of Indicators 2011, Jamaica has either met or is on target to meet its objectives to reduce growth rates and fertility levels while increasing life expectancy.

Jamaica is currently at the intermediate stage of the demographic transition. The changes in Jamaica's population are consistent with changing age structures of any population at this stage — a declining 0–14 age group; and an increasing working age population (15–64 years) and dependent elderly age group (65+ years). Population ageing is a major outcome of these demographic changes that have implications for areas including: labour market; social security; health care; education; welfare of older persons; and other associated development imperatives. Natural increase (births minus deaths) was 7.8 per 1 000 population (Table 20.1). The net

TABLE 20.1
POPULATION GROWTH STATISTICS, 1999-2013

	NUMBER							RATE (PER 1 000 POPULATION)				
Year	**Population at the 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
1999	2 581 700	2 574 300	52 500	18 200	-22 400	34 300	12 000	20.4	7.1	-8.7	13.3	0.6
2000	2 597 100	2 589 400	56 100	17 400	-23 300	38 700	15 500	21.7	6.7	-9.0	15.0	0.6
2001	2 610 500	2 604 100	49 500	17 800	-23 900	31 700	7 800	19.0	6.8	-9.2	12.2	0.5
2002	2 620 000	2 615 300	47 500	16 700	-21 200	30 800	9 600	18.2	6.4	-8.1	11.8	0.4
2003	2 629 400	2 624 700	45 600	17 300	-18 800	28 300	9 500	17.4	6.6	-7.2	10.8	0.4
2004	2 638 900	2 634 100	44 800	16 300	-19 000	28 500	9 500	17.0	6.2	-7.2	10.8	0.4
2005	2 648 300	2 643 600	46 400	17 400	-19 400	29 000	9 600	17.6	6.6	-7.3	11.0	0.4
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 r	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 r	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 r	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 r	2 711 500	2 707 800	40 000	17 000	-15 000	23 000	8 000	14.8	6.3	-5.5	8.5	0.3
2013p	2 718 000	2 714 700	36 700	15 400	-14 700	21 300	6 600	13.5	5.7	-5.4	7.8	0.2

Notes:

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 representevents reported by the Registrar General's Department (RGD)and are adjusted for under coverage by STATIN.
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.
Discrepancies are due to rounding.

r - revised
p - provisional

Source: Statistical Institute of Jamaica (STATIN)

1 Planning Institute of Jamaica, Vision 2030 Jamaica – National Development Plan, Population Sector Plan (Kingston: PIOJ, 2010).

migration rate showed an outflow of 5.4 per 1 000 population. The annual population growth rate has been consistently declining and recorded its lowest rate, 0.2 per cent, in 2013. The population at the end of the year was estimated at 2 718 000.

POPULATION SIZE AND GROWTH

The three principal processes underpinning population growth are fertility, mortality and migration. The interaction of these processes results in additions through births and immigration, and subtractions through deaths and emigration. Live births were estimated at 36 700 [2] and deaths at 15 400, resulting in a natural increase of 21 300. Net external movements[3] of 14 700 contributed to a net population growth of 6 600, the lowest in 15 years (see Table 20.1).

POPULATION AGE STRUCTURE

The end of year population for 2013 disaggregated by sex shows 1 345 500 males (49.5 per cent) and 1 372 500 females (50.5 per cent) {Table 20.2 and Figure 20A}. The sex ratio was

TABLE 20.2
POPULATION OF JAMAICA BY AGE AND SEX, END OF YEAR, 2010–2013

NUMBER

	2010		2011		2012		2013	
AGE GROUP	**MALE**	**FEMALE**	**MALE**	**FEMALE**	**MALE**	**FEMALE**	**MALE**	**FEMALE**
TOTAL	**1 333 100**	**1 362 400**	**1 337 800**	**1 366 300**	**1 341 700**	**1 369 800**	**1 345 500**	**1 372 500**
TOTAL POP.	**2 695 500**		**2 704 100**		**2 711 500**		**2 718 000**	
0-4	107 000	104 600	104 400	101 700	102 400	99 600	99 500	95 900
5-9	115 600	112 400	113 000	110 100	110 600	107 700	108 700	106 300
10-14	136 300	130 600	132 000	126 700	127 400	122 400	123 300	118 600
15-19	139 400	134 600	141 600	136 400	142 000	136 900	138 800	134 300
20-24	124 700	125 100	126 300	125 400	127 500	125 700	130 000	127 300
25-29	109 600	116 000	110 400	116 200	110 900	115 400	112 100	115 200
30-34	88 000	97 900	89 500	98 900	93 300	102 000	97 800	105 500
35-39	86 700	97 100	85 700	96 000	83 600	94 200	82 500	93 200
40-44	85 400	88 000	85 900	92 200	86 500	93 300	85 700	93 300
45-49	78 600	75 700	80 400	79 000	80 500	81 400	81 300	83 900
50-54	66 900	70 000	68 500	69 900	71 100	70 900	73 300	72 000
50-55	50 400	49 700	52 100	51 600	54 900	55 200	57 700	58 300
60-64	44 100	43 400	45 000	43 300	45 400	43 600	45 800	44 500
65-69	32 400	32 600	33 900	33 600	35 300	34 900	36 700	36 100
70-74	24 600	26 600	25 000	26 600	25 400	27 000	26 200	27 400
Over 75	43 400	58 100	44 100	58 700	44 900	59 600	46 100	60 700

PERCENTAGE

	2010		2011		2012		2013	
AGE GROUP	**MALE**	**FEMALE**	**MALE**	**FEMALE**	**MALE**	**FEMALE**	**MALE**	**FEMALE**
TOTAL POP.	**49.5**	**50.5**	**49.5**	**50.5**	**49.5**	**50.5**	49.5	50.5
0-4	4.0	3.9	3.9	3.8	3.8	3.7	3.7	3.5
5-9	4.3	4.2	4.2	4.1	4.1	4.0	4.0	3.9
10-14	5.1	4.8	4.9	4.7	4.7	4.5	4.5	4.4
15-19	5.2	5.0	5.2	5.0	5.2	5.1	5.1	4.9
20-24	4.6	4.6	4.7	4.6	4.7	4.6	4.8	4.7
25-29	4.1	4.3	4.1	4.3	4.1	4.3	4.1	4.2
30-34	3.3	3.6	3.3	3.7	3.4	3.8	3.6	3.9
35-39	3.2	3.6	3.2	3.6	3.1	3.5	3.0	3.4
40-44	3.2	3.3	3.2	3.4	3.2	3.4	3.2	3.4
45-49	2.9	2.8	3.0	2.9	3.0	3.0	3.0	3.1
50-54	2.5	2.6	2.5	2.6	2.6	2.6	2.7	2.6
55-59	1.5	1.8	1.9	1.9	2.0	2.0	2.1	2.1
60-64	1.6	1.6	1.7	1.6	1.7	1.6	1.7	1.6
65-69	1.2	1.2	1.3	1.2	1.3	1.3	1.4	1.3
70-74	0.9	1.0	0.9	1.0	0.9	1.0	1.0	1.0
Over 75	1.6	2.2	1.6	2.2	1.7	2.2	1.7	2.2

r - revised

Source: Data supplied by the Statistical Institute of Jamaica

2 Estimates of births and deaths from STATIN

3 Net external movements are based on net arrivals and departures of Jamaicans, whether travelling temporarily or permanently overseas.

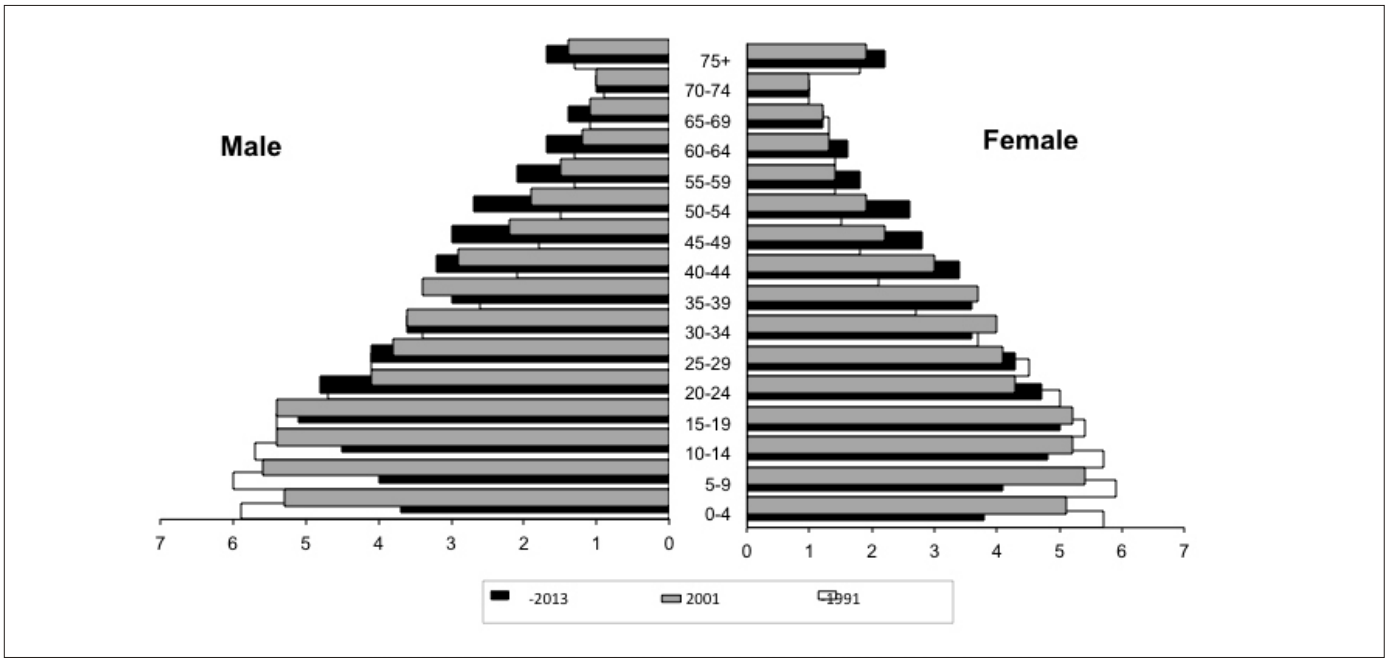

FIGURE 20A: POPULATION BY AGE AND SEX, CENSUS 1991, 2001 AND ESTIMATES 2013

98.0 males per 100 females, indicating little variation in the sex composition of 97.9 males per 100 females in 2012. In the 0–14 age group the sex ratio was 103.3 males per 100 females, while in the working age and the dependent elderly age groups (65+years) the sex ratios were 97.6 and 87.8 males per 100 females, respectively.

The 0–14 age group totalled 652 300 (24.0 per cent) of the total population, representing a decline in the number of children when compared with the previous year. Population projections[4] from the Statistical Institute of Jamaica (STATIN) show that further declines will be a feature of this group for the next 20 years; which is projected to reach approximately 23.2 per cent of the population by 2030 (Figure 20B).

Similarly, the proportion of the working age population (15–64 years) increased to 1 832 500 persons, representing 67.4 per cent of the total population, with the majority being female (927 500). Projections have also indicated that this age group will continue to increase but by 2020 or shortly thereafter, will decline (Figure 20B).

The elderly population (60+ years) totalled 323 500, comprising 168 700 females. This group increased to 11.9 per cent of the total population compared with 11.7 per cent in 2012. The high proportion of women in the elderly age group is attributable to women having higher survival rates than men. The percentage of the "dependent elderly" population (65+years) increased to 8.6 per cent (233 200) of the total population. Substantial increases are expected in this age group based on population projections up to 2050.

The age structure of a population will have an impact on its social and economic development. The Age Dependency Ratio (ADR)[5] or total dependency ratio is an indicator or a measure of the potential impact of these changes. The ADR was 48.0 dependents per 100 persons of working age in 2013 compared with 73.3 dependents per 100 persons of working age in 1991. This decline is as a result of the demographic dividend[6] or demographic bonus created by the constant increase in the working age population. This demographic dividend may impact not only demographic changes inter alia, but also investments in human capital development, and socio-economic and governance policies. This window of opportunity, if adequately utilized, can boost growth and development.

FERTILITY AND FAMILY PLANNING

Births were estimated at 36 700, which equates to a Crude Birth Rate (CBR) of 13.5 births per 1 000 population. The continued decline in fertility is consistent with the experience of countries going through the intermediate stage of the demographic transition. The General Fertility Rate (GFR) was 48.8 births per 1 000 women 15–49 years compared with 54.8 births per 1 000 women in 2012 (Table 20.3a). Despite the increase in the number of women of reproductive age — approximately 752 700 women — there was a continuous decline in the GFR, indicative of the overall reduction in the number of births (see Table 20.3a). The decline in the number of births is linked to several factors including: an increased contraceptive prevalence rate; delay in childbearing; improved educational attainment of women; and an increase in the proportion of women in the labour force.

On April 1, 2013, elements of the National HIV/STI Programme (NHP) were integrated into the mandate of the

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

5 The ratio of the population in the dependent ages, that is, those under 15 years, plus those 65 and over to those in the working ages, 15–64 years. This is also a measure of the relative age structure of the population.

6 The demographic dividend is the accelerated economic growth that may result from a decline in a country's mortality and fertility and the subsequent change in age structure of the population so that the working ages row larger relative to the youth population.

FIGURE 20B: PER CENT DISTRIBUTION OF POPULATION BY AGE AND SEX FOR 2013 AND PROJECTIONS FOR 2020 AND 2030

National Family Planning Board (NFPB). The integration has resulted in the creation of the **National Family Planning Board-Sexual Health Agency (NFPB-SHA)**. The objective of this new entity is to facilitate an inclusive and holistic approach to providing services that will:

- improve contraceptive choice and safety
- reduce STIs including HIV
- promote healthy sexuality involving adolescent health and reducing harmful practices.

At the regional level, the project for Primary Health Care Renewal will address the need for integrated service delivery for all health issues generally (see chapter on Health). At the agency level, the NFPB-SHA would no longer focus solely on only HIV or family planning as its services will be consolidated and the scope expanded. These services include, but are not limited to, risk reduction counselling; outreach to high risk and other key population groups; training of health care workers (HCW) and beneficiaries; contraceptive procurement and distribution; policy/advocacy; and research.

Prior to the integration, targets were outlined within the former NFPB's 2011–2015 Strategic Plan and the former NHP's 2012–2017 Strategic Plan. These have been consolidated to formulate the NFPB-SHA's proposed targets for the 2013–2017 period. The integration of the two entities is not expected to change the administrative work and structure of the NFPB substantially, as the organizational structure of both the HIV/STI programme and the NFPB are similar. However, it must be noted that based on the proposed changes to the technical mandate of the organization, a consultant was recruited to develop a revised organizational framework for the NFPB-SHA.

In October, the NFPB-SHA Integration Committee had their first Annual Review and Planning Retreat under the theme "Integration: System Strengthening and the Integration of Service Delivery". The objectives were to: provide an update on the National Sexual Reproductive Health response in Jamaica; present and critically review the UN high-level targets and the Post-2015 Development Agenda; develop a roadmap towards Jamaica's application to the Global Fund using the New Funding Model; and chart a course for integration at the point of service delivery.

The NFPB-SHA reported that among new acceptors attending family planning clinics in public sector institutions, the Injection remained the most popular method of choice, accounting for 54.7 per cent of new acceptors for the January to June 2013 period (Table 20.3b). The Condom and Pill were the second and third most popular methods of contraception, accounting for 24.0 per cent and 18.6 per cent of new acceptors, respectively. For the period January to June 2013 new acceptors of the Injection declined by 3.4 percentage points compared with the January to June 2012 period. New acceptors of the IUD also declined by 0.4 percentage points.

Dual Method Users (DMU) utilize the male or female condom to prevent pregnancy and sexually transmitted infections combined with the use of a primary contraceptive method, such as the Pill. The NFPB-SHA reported that the total number of new family planning acceptors practising dual method use increased by 11.5 per cent to 41 153 in January to June 2013 from 36 922 in the January to June 2012 period. The South-East Regional Health Authority (SERHA) accounted for approximately 47.0 per cent of all users while adolescents accounted for 12.8 per cent of all DMU. The increase in DMU is due in part to activities by NFPB-SHA which have been reported to be the most appropriate and effective mechanism to stem the incidence of HIV/AIDS and/or STIs and prevention of unwanted pregnancies.

The United Nations Population Fund (UNFPA) in collaboration with the NFPB-SHA continued to support several programmes aimed at bolstering sexual and reproductive health (SRH) service and commodity security in Jamaica. An evaluation of the Contraceptive Logistics Management Information System (CLMIS) was undertaken across all four health regions. The objective was to analyse the systems in place at family planning clinics to ascertain demand for commodities, and how commodities are stored and distributed. Additionally, assistance was given to the process by training health and education providers about the importance of the integration of family planning and components of the National HIV/STI Programme (NHP), and the benefits to be derived. In keeping with their mandate to incorporate men into the family planning programme, a 5K run for fathers was staged on Father's Day, June 16, to bring men together and increase their awareness and involvement of SRH issues.

The NFPB-SHA provided information and counselling services through many outreach activities. They included: the provision of accurate sexual health information to the public by

TABLE 20.3a
DISTRIBUTION OF WOMEN IN THE REPRODUCTIVE AGES (15-49) ESTIMATES, 2010-2013

AGE GROUP	2010	2011	2012	2013	2010	2011	2012	2013
15-19	134 600	136 400	136 900	134 300	18.3	18.3	18.3	17.8
20-24	125 100	125 400	125 700	127 300	17.0	16.9	16.8	16.9
25-29	116 000	116 200	115 400	115 200	15.8	15.6	15.4	15.3
30-34	97 900	98 900	102 000	105 500	13.3	13.3	13.6	14.0
35-39	97 100	96 000	94 200	93 200	13.2	12.9	12.6	12.4
40-44	88 000	92 200	93 300	93 300	12.0	12.4	12.4	12.4
45-49	75 700	79 000	81 400	83 900	10.3	10.6	10.9	11.2
TOTAL	**734 400**	**744 100**	**748 900**	**752 700**	**100.0**	**100.0**	**100.0**	**100.0**
GFR	56.2	55.5	54.8	48.8				

Note: Discrepancies due to rounding

Source: Statistical Institute of Jamaica (STATIN)

TABLE 20.3b
UTILIZATION AND COVERAGE OF PUBLIC SECTOR FAMILY PLANNING SERVICES, 2009-2013

INDICATOR	2009	2010	2011	2012[r]	2013[a]
Estimated population for family planning	517 378	518 673	520 098	516 794	n/a
Attendance at family planning clinics	292 374	312 314	296 564	303 676	151 891
Number of family planning users (per annum)	94 526	81 508	80 299	82 941	74 847
Number of new acceptors	41 034	39 360	40 925	41 845	20 313
Number of new acceptors as a % of total users	43.4	48.2	51.0	51.0	27.1
New acceptors < 20 yrs. of age as a % of new acceptors	19.1	20.1	19.2	19.6	19.4
New acceptors as a percentage of target population	7.9	7.6	7.9	8.1	n/a
Male attendance as a % of total attendance	8.8	6.6	8.6	8.3	7.6
Percentage distribution of new acceptors by method					
Pill	24.6	21.9	18.4	18.1	18.6
Injection (DMPA)	51.8	55.0	52.2	57.0	54.7
Male Condom	21.2	20.2	26.5	22.0	24.0
Jadelle/Norplant & IUD	2.2	2.8	2.9	2.9	3.1
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Number of sterilizations (female)	1 791	1 626	1 569	1893	745

r - revised
Note: Target population = 69.0 per cent of women in the reproductive age group 15-49.
Figures exclude sterilization operations performed, Emergency Contraceptive Pill and Diaphragm .
Jadelle replaced Norplant in 2010
a - Data reported for 2013 reflect the months of January-June
n/a- not available

Source: National Family Planning Board (NFPB)

the Marge Roper Counselling Service, accessed through walk-ins, call-ins and write-ins; the broadcast of 19 radio advice programme segments; 7 rap sessions; and the publication of 25 newspaper columns were published in *The Star*. Engagements were also held at offices, schools, faith based organizations, institutions for persons living with disabilities (PWDs), training institutions and other entities. The television programme *Teen Seen* underwent some evaluation to identify if the programmes being aired were "edutaining" young people on issues and concerns that impacted their sexual and reproductive health. Some 167 males and females between the ages of 10 and 24 years participated in a survey to address the content and programme objectives. Based on the findings, future episodes of *Teen Seen* will incorporate recommendations to ensure that the programme is meeting the needs and objectives of its target audience.

Provision and Access of Sexual Reproductive Health Services to Adolescents

Vision 2030 Jamaica articulates the intention of the government of Jamaica (GOJ) to ensure that "adolescents and youth are fully empowered, protected and enabled to fully realize their social, cultural and human rights; fulfil their physical, economic and social aspirations". In an effort to fulfil this mandate, the GOJ embarked on research to amend the policy and legal framework restricting adolescents' access and utilization of products and services. Also, a policy to address the needs of teenage mothers was implemented. Some of the government's initiatives undertaken in this area included the following:

– A high-level dialogue meeting convened in August to understand the sexual and reproductive issues faced by adolescents and to agree on areas for inter-ministerial partnership was held. It is anticipated that from the issues outlined, a framework will be formulated on the provision of immunity to health-care practitioners who offer services to sexually active adolescents without parental consent

– A joined-up government approach, through the ministries with responsibility for health, foreign affairs, youth and education, with support from the UNFPA, participated in a study to review the legislative, policy and regulatory framework for adolescent reproductive health. The study entitled "The Law and Policy Framework for Adolescent Sexual and Reproductive Health (ASRH) in Jamaica" highlights the current environment and policy framework for adolescent reproductive health in Jamaica and provides recommendations on how to address some of the key gaps. A major finding from the study reveals the inconsistency that exists between reproductive health policies and existing laws. This discrepancy acts as a barrier to minors' access to SRH services and creates dissonance in adolescents and service providers such as guidance counsellors and health practitioners.

– A **National Policy on the Reintegration of School-Aged Mothers into the Formal School System** was approved in 2013 to respond to the challenges and needs of school-aged girls who become pregnant. The development of the National Policy was led by the Women's Centre of Jamaica Foundation in collaboration with the Ministry of Education, with technical and financial support from UNFPA. The policy development process was initiated in 2011 and the consultations involved various ministries, departments and agencies (MDAs), and with non-state agencies. Due to a lack of policy guidelines, most school-aged girls were integrated based on the discretion of the school and as such, girls encountered "cultural and institu-

tional resistance to their right to an education"[7]. The policy provided the framework for teenage mothers to re-enter the public school system to continue their formal education. The key elements of the policy are:

- Automatic referral of all pregnant girls to the Women's Centre of Jamaica Foundation
- Reintegration of all teen mothers into the formal school system, either in their former school or in another school at the same level
- Introduction of a system to monitor adolescent mothers to ensure completion of their education
- To increase prevention messages to reduce the incidence of teen pregnancy[8].

MORTALITY

The estimated number of deaths in 2013 was 15 400. The Crude Death Rate (CDR) was 5.7 deaths per 1 000 population, the lowest since 1999 (see Table 20.1). The death rate remained consistent with national population projections (medium variant) for the period 2010–2015[9]. In 2012, the five leading causes of death among males were: external causes; cerebrovascular disease; diabetes mellitus; malignant neoplasm of prostate; and ischaemic heart diseases. In the external causes category, the top three were: assault; transport accidents; and falls. For women, the top five leading causes of death were: diabetes mellitus; cerebrovascular disease; hypertensive diseases; ischaemic heart disease; and other heart diseases.

SPATIAL DISTRIBUTION

According to the Statistical Institute of Jamaica (STATIN), "any high density settlement with a population concentration of 2 000 or more persons according to last census of Jamaica urban places possess a number of facilities and utilities that, in Jamaica, indicate modern living" [10] is considered urban. The 2011 Population and Housing Census findings state that approximately 54.0 per cent of the Jamaican populations reside in urban areas. The largest proportion of the population continued to be found in Kingston and St, Andrew (24.6 per cent), followed by St. Catherine (19.1 per cent). Hanover recorded the lowest proportion of the total population (2.6 per cent) {Table 20.4}.

INTERNATIONAL MIGRATION

International migration is a global phenomenon that is multifaceted and multidirectional. Its continued growth in scope and impact makes it an integral component in broader development processes.

Emigration

Estimates for 2012 revealed that 25 860 persons were granted permanent residence in the United States of America (USA), United Kingdom (UK) and Canada. It must be noted that data for the USA includes Jamaicans who received their visas in Jamaica, those already living in the **USA**, and those living elsewhere (Table 20.5a). The number of Jamaicans being granted permanent residence status to the USA was estimated at 20 705, a 5.3 per cent increase from 2011 (Table 20.5b). Jamaica was ranked 11th among countries with the highest Legal Permanent Resident (LPR) flow, a slight shift relative to its 12th place in 2011. Jamaica was also ranked 3rd among

TABLE 20.4
END OF YEAR POPULATION OF JAMAICA BY PARISH, 2009-2013

	End of Year Population 2009	End of Year Population 2010	End of Year Population 2011	End of Year Population 2012	End of Year Population 2013	% Distribution 2013
JAMAICA	2 686 100	2 695 500	2 704 100	2 711 500	2 718 000	
Kingston & St. Andrew	661 000	662 100	664 200	666 000	667 600	24.6
St. Thomas	93 600	93 800	94 100	94 400	94 600	3.5
Portland	81 500	81 700	82 000	82 200	82 400	3.0
St. Mary	113 300	113 500	113 900	114 200	114 500	4.2
St. Ann	171 600	172 200	172 800	173 200	173 700	6.4
Trelawny	74 900	75 100	75 300	75 600	75 700	2.8
St. James	182 700	183 600	184 200	184 700	185 100	6.8
Hanover	69 200	69 500	69 700	69 900	70 000	2.6
Westmoreland	143 400	144 000	144 400	144 800	145 200	5.3
St. Elizabeth	149 700	150 100	150 600	151 000	151 400	5.6
Manchester	189 300	189 700	190 300	190 800	191 300	7.0
Clarendon	244 000	244 900	245 700	246 300	246 900	9.1
St. Catherine	511 800	515 300	516 900	518 400	519 600	19.1

Source: Statistical Institute of Jamaica.

7 Ministry of Education, National Policy on the Reintegration of School-Aged Mothers into the Formal School System (Kingston: MOE, 2013).
8 Ibid.
9 STATIN, ***Population Projections Jamaica 2000–2050*** (Kingston: STATIN, 2008).
10 STATIN, ***Census Population Map Book Volume 12***, Part 6, (Kingston: STATIN), 232.

Latin American and Caribbean countries. Of the two classes of entrants, 56.2 per cent was categorized as new arrivals whereas the remainder (43.8 per cent), an adjustment in status. Data were also available on the marital status of emigrants: 49.7 per cent was reported married, 46.0 per cent single, while 4.3 per cent was classified as "Other" or "Unknown".

Migration to the USA continued to be age and sex selective (Table 20.5b). Females accounted for 55.7 per cent of total migrants, outnumbering males in all age groups. A large proportion of emigrants, 74.1 per cent, was from the working age group (18–44 years). There was an increase in the dependent elderly age group (65 +) to 3.6 per cent, the highest since 2009. Of the seven categories of workers who emigrated, the majority was reported in the Service occupations (11.7 per cent), while 5.2 per cent was classified in the Management, Professionals and Related Occupations groups. The "No Occupation" category is comprised of four groups — "Homemakers"; "Students or Children"; "Retirees"; and "Unemployed" — and was approximately 46.1 per cent (Table 20.5c). The largest proportion within this category was "Students or Children", which accounted for 64.2 per cent. The group "Unemployed" increased by 5.4 per cent since 2011.

Emigrants are admitted based on six categories: Family Sponsored Preferences; Employment Based Preferences; Immediate Relatives to US Citizens; Refugee and Asylee Adjustments; Diversity Programmes; and Other (Table 20.5d). Family reunification[11] continued to be the main reason for emigration to the USA, representing 96.7 per cent, similar to that of 2011. Migrants categorized as "Immediate relatives to US Citizens" accounted for 68.5 per cent, an increase of approximately 2.8 percentage points relative to 2011 (see Table 20.5d). Emigrants under "Family Sponsored Preferences" were the second highest category with 28.2 per cent.

There were 2 150 emigrants to **Canada** in 2012 (see Table 20.5a). The highest proportion of migrants was concentrated in the 25–44 age groups[12] (46.5 per cent) similar to 2011 (46.2 per cent) {Table 20.5e}. Up to the time of publication, no additional data was received indicating Jamaica's rank and position for 2012.

The Professional and Service Workers occupational groups recorded the largest proportions of emigrant workers to Canada, 5.1 per cent and 4.0 per cent, respectively (Table 20.5f). From 2007 to 2010, the Craft and Related Trades category ranked second, however, it declined by 3.1 percentage points since 2011 and was replaced by Service Workers. "Non-workers, New Workers, Homemakers, Students and Retirees" continued to be very high, 75.3 per cent (see Table 20.5f). The figure for the category "Unknown" declined from 14.8 per cent in 2011 to 12.3 per cent in 2012.

TABLE 20.5a
MAIN STREAMS OF MIGRATION FROM JAMAICA, 2002–2012

	COUNTRY			
YEAR	USA[a]	CANADA[b]	UK[c]	TOTAL
2002	14 835	2 457	2 026	19 318
2003	13 347	1 983	2 799	18 129
2004	14 430	2 130	3 161	19 721
2005	18 346	1 880	3 520	24 976
2006	24 976	1 686	2 526	29 188
2007	19 375	2 113	3 165	24 653
2008	18 477	2 312	2 715	23 504
2009	21 783	2 380[r]	3 148	27 311[r]
2010	19 825	2 260[r]	2 958	25 043[r]
2011	19 662	2 025[r]	2 514	24 161[r]
2012	20 705	2 150	3 005	25 860

a - Period of reference is the fiscal year for the United States of America, i.e. from October of the previous year to September of the next year.
b - Period of reference is the Calendar Year 2002 - 2012. These figures represent Landings from Jamaica (Country of Last Permanent Residence).
c - Persons granted British citizenship

r - revised

Source: Compiled from data provided by:
- Yearbook of Immigration Statistics 2011, September 2012, Office of Immigration Statistics, U.S. Department of Homeland Security
Canada, Facts and Figures, 2012, Citizenship and Immigration Canada, August 2013
- Immigration Statistics October-December 2012, February 2013

11 This refers to two categories: Family Sponsored Preferences and Immediate Relatives to US Citizens. Family Sponsored Preferences consists of four categories: unmarried sons and daughters of US citizens and their children; spouses, children, and unmarried sons and daughters of lawful permanent residents and their children; married sons and daughters of US citizens and their spouses and children; and brothers and sisters of US citizens aged 21 and over and their spouses and children. Immediate Relatives to US Citizens are spouses and children of US citizens and adult US citizens aged 21 years and over.

12 Source: Citizenship and Immigration Canada, RDM as of July 2013.

TABLE 20.5b
MIGRANTS FROM JAMAICA TO THE UNITED STATES OF AMERICA BY AGE AND SEX 2009–2012

AGE GROUP	MALE				FEMALE				TOTAL			
YEARS	2009	2010	2011	2012	2009	2010	2011	2012	2009	2010	2011	2012
						NUMBER						
Under 18 years	2 360	2 195	2 281	2 279	2 561	2 304	2 342	2 324	4 921	4 499	4 623	4 603
18-24	1 566	1 375	1 322	1 500	1 495	1 390	1 400	1 540	3 061	2 765	2 722	3 040
25-34	2 343	2 019	1 870	1 963	2 258	2 091	1 972	1 978	4 601	4 110	3 842	3 941
35-44	1 867	1 556	1 603	1 622	2 300	2 076	2 126	2 185	4 167	3 632	3 729	3 807
45-54	1 034	1 031	949	1 083	1 818	1 824	1 797	1 929	2 852	2 855	2 746	3 012
55-64	475	430	499	494	971	856	935	1 067	1 446	1 286	1 434	1 561
65 and over	242	224	185	233	493	454	381	508	735	678	566	741
Total	**9 887**	**8 830**	**8 709**	**9 174**	**11 896**	**10 995**	**10 953**	**11 531**	**21 783**	**19 825**	**19 662**	**20 705**
						PERCENTAGE						
Under 18 years	10.8	11.1	11.6	11.0	12.2	11.8	11.9	11.2	24.1	22.6	23.5	22.2
18-24	7.2	6.9	6.7	7.2	7.1	6.9	7.1	7.4	13.8	14.1	13.8	14.7
25-34	10.8	10.2	9.5	9.5	9.9	10.4	10.0	9.6	20.1	21.2	19.5	19.0
35-44	8.6	7.8	8.2	7.8	10.4	10.5	11.0	10.6	18.8	19.1	19.2	18.4
45-54	4.7	5.2	4.8	5.2	8.3	8.3	9.1	9.3	13.3	13.0	13.9	14.5
55-64	2.2	2.2	2.5	2.4	4.1	4.4	4.8	5.2	6.7	6.6	7.3	7.5
65 and over	1.1	1.1	0.9	1.1	2.2	2.3	1.9	2.5	3.2	3.4	2.8	3.6
Total	**45.4**	**44.5**	**44.2**	**44.3**	**54.2**	**54.6**	**55.8**	**55.7**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Yearbooks of Immigration Statistics 2009, 2010, 2011 and 2012
Office of Immigration Statistics, US Department of Homeland Security.

Data on Jamaicans migrating to the **United Kingdom** (UK) revealed that 3 005 persons were granted citizenship[13] for 2012, an increase of 19.5 per cent over 2011 (Table 20.5g). British citizenship is approved on four bases: Residence, Marriage, Entitlement or Discretionary[14]. Approximately, 44.8 per cent of all who received British citizenship did so based on Residence status and 19.8 per cent due to Marriage. The highest proportion of those who were granted citizenship on a

TABLE 20.5c
JAMAICAN MIGRANTS TO THE UNITED STATES OF AMERICA BY OCCUPATIONAL STATUS, 2009–2012

	NUMBER				PERCENTAGE			
	2009	2010	2011	2012	2009	2010	2011	2012
Management, Professionals and Related Occupations	1 138	1 010	1 020	1 079	5.2	5.1	5.2	5.2
Sales and Office Occupations	510	492	506	502	2.3	2.5	2.6	2.4
Farming, Fisheries and Forestry Occupations	243	253	270	329	1.1	1.3	1.4	1.6
Construction, Extraction, Maintenance and Repair Occupations	190	219	166	277	0.9	1.1	0.0	1.3
Production, Transportation and Material Moving Occupations	549	459	296	276	2.5	2.3	1.5	1.3
Service Occupations	3 484	2 761	2 346	2 422	16.0	13.9	12.1	11.7
No occupation[a]	10 049	9 239	9 064	9 525	46.2	46.6	46.6	46.1
Not reported	5 620	5 392	5 954	6 295	25.8	27.2	30.6	30.4
TOTAL	**21 783**	**19 825**	**19 622**	**20 705**	**100.0**	**100.0**	**100.0**	**100.0**
TOTAL WORKERS	**6 114**	**5 194**	**4 604**	**4 885**	**28.0**	**26.2**	**23.5**	**23.5**

a - No occupation includes homemakers, students with children, retirees and the unemployed.

Source: Yearbooks of Immigration Statistics, 2009, 2010, 2011 and 2012
Office of Immigration Statistics, US Department of Homeland Security.

13 UK Home Office, ***Control of Immigration: Statistics United Kingdom October–December 2013*** (Home Office Statistical Bulletin, February 2014).

14 Entitlement is based on those applicants who satisfy the conditions specified in the 1981 Act. Discretionary, on the other hand, relates to the success of the application based on the information provided to the Secretary of State. UK Home Office, ***User Guide to Home Office Immigration Statistics*** (February 23, 2012).

discretionary basis was classified as Minor Children (15.7 per cent) {Table 20.5g}.

Immigration

An immigrant refers to a resident in a given country entering another country in order to take up permanent residence[15]. There are varying classes of immigrants: Returned Residents; Involuntary Returned Migrants; Refugees; Commonwealth Citizens; and Aliens. Immigrants play an important role in establishing a more economically viable country. Upon return to country of origin, they remit their technical skills and expertise, provide international and cultural knowledge, and bring additional perspectives. This fosters nation-building and creates an environment poised to achieve sustainable development.

Returned Residents (Voluntary)

The number of returned residents was 839, a 15.0 per cent decrease compared with 2012 (Table 20.5h). The majority came from the USA (48.0 per cent) and the UK (21.5 per cent). There were declines in the number of returned residents from all countries, with the exception of Canada. The largest decline of 18.4 per cent was evident in the USA.

Involuntary Returned Migrants (Deportees)

The subject of "deportees" has continued to be a prominent issue internationally and in Jamaica. Efforts have been made to improve the monitoring and management of deportees by enforcing strict immigration measures and increased border management. Several countries have created institutional frameworks and put policies in place to mitigate the negative consequences of deportation. The Government of Jamaica has addressed the phenomenon of involuntary returned migrants by way of various policies, with the aim of ensuring their reintegration into the society. By placing involuntary returned migrants in a supportive environment, this will facilitate their transition and resettlement thereby enabling them to contribute to national development.

Estimates revealed that there was a continued decline in the number of persons deported to Jamaica, from 2 309 in 2012 to 2 139 in 2013, a reduction of 7.4 per cent (see Table 20.5h). The majority was deported on the basis of Overstay/Illegal Entry/Re-Entry, and Drugs, 37.0 per cent and 32.7 per cent, respectively (see chapter on National Security and Justice). Males continued to dominate the list of offenders, 85.1 per cent, compared with females. The largest proportion of deportees was found between the ages of 31 and 35 years. The USA, Canada and the UK all recorded declines in the number of deportees while the category Other Countries increased to 612 in 2013 from 548 in 2012 (see Table 20.5h).

Commonwealth Citizens and Aliens

The number of Commonwealth Citizens that were issued extensions beyond six months declined from 3 426 in 2012 to 3 105 in 2013. However, there was an increase in the number of individuals registered as Aliens (non-Commonwealth Citizens) to 5 950 from 5 457 in 2012 (Table 20.5i).]

POPULATION AND DEVELOPMENT

Globally, the position of integrating population variables into development is to improve the quality of life for everyone through development strategies, and planning and decision-making at all levels. The population and development issues given special emphasis during the period were: mainstreaming migration into development; the Modernization

TABLE 20.5d
JAMAICAN IMMIGRANTS ADMITTED TO THE UNITED STATES OF AMERICA BY SELECTED CLASS OF ADMISSION, 2009–2012

	NUMBER				PERCENTAGE			
	2009	2010	2011	2012	2009	2010	2011	2012
Family Sponsored Preferences	4 833	5 386	6 074	5 818	22.2	27.2	30.9	28.2
Employment Based Preferences	593	562	602	589	2.7	2.8	3.1	2.8
Immediate Relatives to US Citizens	16 290	13 781	12 882	14 193	74.8	69.5	65.7	68.5
Refugee and Asylee Adjustments	24	d	6	57	0.1	0.0	0.0	0.3
Diversity Programmes	6	d	d	3	0.0	0.0	0.0	0.0
Other	37	96	58	45	0.2	0.5	0.3	0.2
Total	21 783	19 825	19 622	20 705	100.0	100.0	100.0	100.0

d - Disclosure standards not met

Source: Yearbooks of Immigration Statistics 2009, 2010, 2011 and 2012
Office of Immigration Statistics, US Department of Homeland Security.

15 Jacob Siegel/David A. Swanson (eds.), ***The Methods and Materials of Demography***, Second Edition (San Diego: Elsevier Academic Press, 2004).

TABLE 20.5e
PERMANENT RESIDENTS ADMITTED FROM JAMAICA TO CANADA BY AGE, 2009-2012

AGE GROUP	2009[r]	2010[r]	2011[r]	2012
0-4	90	85	65	70
5-9	185	170	125	160
10-14	255	190	170	185
15-19	300	250	185	185
20-24	220	195	215	195
25-29	210	250	275	265
30-34	285	285	285	280
35-39	275	250	210	250
40-44	215	195	165	205
45-49	150	110	130	130
50-54	90	80	75	70
55-59	50	70	35	65
60-64	30	55	30	40
65+	70	75	60	50
TOTAL	**2 380**	**2 260**	**2 025**	**2 150**
0-4	3.8	3.8	3.2	3.3
5-9	7.8	7.7	6.2	7.4
10-14	10.7	8.6	8.4	8.6
15-19	12.6	11.3	9.1	8.6
20-24	9.2	8.8	10.6	9.1
25-29	8.8	11.3	13.6	12.3
30-34	12.0	12.9	14.1	13.0
35-39	11.5	11.3	10.4	11.6
40-44	9.0	8.8	8.1	9.5
45-49	6.3	5.0	6.4	6.0
50-54	3.8	3.6	3.7	3.3
55-59	2.1	3.3	1.7	3.0
60-64	1.3	2.5	1.5	1.9
65+	1.1	1.1	3.0	2.3
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**

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Note: Data for 2012 are preliminary estimates for January to June and are subject to change.

Source: Citizenship and Immigration, Canada

Programme of the Civil Registration and Vital Statistics System (CRVS); and diaspora-related issues.

The **UN High-Level Dialogue on Migration and Development** was convened October 3–4, 2013 under the theme "Making Migration Work". The objective was to highlight the opportunities and challenges of migration in the context of globalization.

There were four roundtable discussions on the following:

– Assessing the effects of international migration on sustainable development and identifying relevant priorities in view of the preparation of the post-2015 development framework

– Measures to ensure respect for and protection of the human rights of all migrants, with particular reference to women and children, as well as to prevent and combat the smuggling of migrants and trafficking in persons, and to ensure orderly, regular and safe migration

– Strengthening partnership and cooperation on international migration, mechanisms to effectively integrate migration into development policies, and promoting coherence at all levels

– International and regional labour mobility and its impact on development.

International Conference on Population and Development (ICPD) Beyond 2014 Review Assessment of the Programme of Action (PoA)

Jamaica was among 179 countries that adopted the PoA of the International Conference on Population and Development (ICPD) in Cairo, Egypt, September 5–13, 1994 and the Key Actions for the Further Implementation of the PoA of the ICPD adopted by the Twenty-first Special Session of the General Assembly, New York, 30 June to 2 July 1999. Since 1995, Jamaica has been a member of the Commission on Population and Development (CPD) and has provided annual and five-year reports and other technical inputs to the work of the Commission at all its sittings. Jamaica is required to produce a 20-year report that covers the period 1994–2014, the original timespan for the PoA.

In 2012, the Planning Institute of Jamaica (PIOJ) in collaboration with the UNFPA administered the ICPD Global Survey to a sample of 216 key informants in public sector ministries, departments and agencies (MDAs), civil society organizations (CSO) and academia. Between October 2012 and

TABLE 20.5f
MIGRANTS FROM JAMAICA TO CANADA BY OCCUPATION, 2008–2012

OCCUPATION GROUP	2008	2009	2010	2011	2012
			NUMBER		
Professionals, Senior Officials and Technicians	195	195	110	110	110
Clerks	30	35	25	35	5
Service Workers and Shop and Market Sales Workers	100	160	115	150	85
Skilled Agricultural and Fishery Workers	50	35	40	45	20
Craft and Related Trades Workers	95	95	120	105	45
Plant and Machine Operators and Assemblers	15	10	25	35	0
Elementary Occupations	5	5	0	0	0
Non-workers, New Workers, Homemakers, Students and Retirees	1 400	1 515	1 420	1 245	1 620
Unknown	420	330	405	300	265
TOTAL	**2 310**	**2 380**	**2 260**	**2 025**	**2 150**
			PERCENTAGE		
Professionals, Senior Officials and Technicians	8.4	8.2	4.9	5.4	5.1
Clerks	1.3	1.5	1.1	1.7	0.2
Service Workers and Shop and Market Sales Workers	4.3	6.7	5.1	7.4	4.0
Skilled Agricultural and Fishery Workers	2.2	1.5	1.8	2.2	0.9
Craft and Related Trades Workers	4.1	4.0	5.3	5.2	2.1
Plant and Machine Operators and Assemblers	0.6	0.4	1.1	1.7	0.0
Elementary Occupations	0.2	0.2	0.0	0.0	0.0
Non-workers, New Workers, Homemakers, Students and Retirees	60.6	63.7	62.8	61.5	75.3
Unknown	18.2	13.9	17.9	14.8	12.3
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Note: 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*.

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Note: The data obtained from Citizenship and Immigration, Canada were classified according to the Jamaica Standard Occupational Classification, STATIN

Source: Citizenship and Immigration Data, Canada

October 2013, several stakeholder consultations, interviews and meetings were conducted to supplement and enhance the responses from the Global Survey Questionnaire. A national workshop with the aforementioned parties was undertaken to review the draft of the national report and provide additional information. This resulted in three validation workshops to finalize the report being conducted by the Population Thematic Working Group, which was established under **Vision 2030 Jamaica** for monitoring population matters.

The National Report reflected achievements and implementation challenges associated with each of the eight major themes addressed in the Global Survey:

- Population, Sustained Economic Growth and Sustainable Development
- Population Growth and Structure
- Addressing the needs of adolescents and youth
- Addressing ageing and the needs of older persons
- Addressing the needs of persons with disabilities
- Urbanization and Internal Migration
- International Migration and Development
- Family, Well-being of Individuals and Societies
- Reproductive Rights and Reproductive Health, and Health, Morbidity and Mortality
- Gender Equality, Equity and Empowerment of Women
- Population, Development and Education.

Although Jamaica has made substantial progress in many critical areas in implementing the PoA, there are some areas in which the country has not made much progress. The following were some of the priorities identified for the Post-2015 Development Agenda:

- Stronger focus on sustainable development as the framework for population policy and programme interventions
- Continuing focus on reduction in fertility among adolescents and youth as a strategy to break the inter-generational linkages to poverty, inequality and deprivation
- Concerted effort in addressing infant, child and maternal mortality and HIV/AIDS
- Ensuring the integration of population ageing in all development policies, plans and programmes
- Assigning of portfolio responsibility for family well-being.

The **Caribbean Forum on Population Migration and Development** was held in Georgetown, Guyana in July with the specific objective to review and evaluate implementation of the ICPD PoA in the Caribbean sub-region. The meeting provided the opportunity to share best practices and identify

TABLE 20.5g
JAMAICANS RECEIVING BRITISH CITIZENSHIP BY TYPE, 2006–2012

YEAR	RESIDENCE	MARRIAGE	ENTITLEMENT			DISCRETIONARY			
			Adult	Minor Children	Other	Adult	Minor Children	Other	Total
2006	1 108	708	0	216	54	0	440	0	**2 526**
2007	1 574	825	0	228	45	0	493	0	**3 165**
2008	1 275	693	0	245	46	0	455	1	**2 715**
2009	1 434	864	0	304	48	0	497	1	**3 148**
2010	1 156	731	0	478	62	2	529	0	**2 958**
2011	1 011	582	0	388	87	0	444	2	**2 514**
2012	1 345	596	0	370	222	0	472	0	**3 005**
				PERCENTAGE					
2006	43.9	28.0	0.0	8.6	2.1	0.0	17.4	0.0	**100.0**
2007	49.7	26.1	0.0	7.2	1.4	0.0	15.6	0.0	**100.0**
2008	47.0	25.5	0.0	9.0	1.7	0.0	16.8	0.0	**100.0**
2009	45.5	27.4	0.0	9.7	1.5	0.0	15.9	0.0	**100.0**
2010	39.1	24.7	0.0	16.2	2.1	0.0	17.9	0.0	**100.0**
2011	40.2	23.2	0.0	15.4	3.5	0.0	17.7	0.0	**100.0**
2012	44.8	19.8	0.0	12.3	7.4	0.0	15.7	0.0	**100.0**

Source: Control of Immigration Statistics: United Kingdom 2012, February 2013. Home Office Statistical Bulletin, Home Office.

emerging issues, and sought to derive practical recommendations for future action with a view to renewing commitment to the PoA as a central part of the Post-2015 Development Agenda.

The issues of priority concern to the Caribbean with respect to the Cairo PoA were considered in six areas:

- Mainstreaming Migration into National and Regional Development Planning
- International Migration and Development
- Population Dynamics, Poverty and Inequality
- Population Ageing, the Rights of Older Persons and the Rights of Persons With Disabilities
- Access to Reproductive Health Services and Rights
- Adolescents and Youth.

The **First Session of the Regional Conference on Population and Development in Latin America and the Caribbean** was held in Montevideo, Uruguay in August to review the progress made on implementation of the ICPD PoA in the region over the past 20 years. It also identified key measures for strengthening implementation and tackling emerging population and development issues. The Montevideo Consensus provided extensive coverage on several priority areas, with the aim of reinforcing the application and further implementation of the ICPD PoA and its follow-up. The areas pertinent to Jamaica were:

- full integration of population dynamics into sustainable development, with equality and respect for human rights
- recognizing that boys, girls, adolescents and young people are rights-holders and stakeholders in development
- ageing, social protection and socio-economic challenges
- universal access to sexual and reproductive health services
- gender equality

TABLE 20.5h
JAMAICAN RETURNED RESIDENTS AND INVOLUNTARY RETURNED MIGRANTS, 2009–2013

	RETURNED RESIDENTS					INVOLUNTARY RETURNED MIGRANTS				
YEAR	USA	CANADA	UK	OTHER	TOTAL	USA	CANADA	UK	OTHER	TOTAL
2009	698	123	290	205	1 316	1 472	223	619	762	**3 076**
2010	554	137	247	196	1 134	1 371	189	458	807	**2 825**
2011	522	147	208	191	1 068	1 379	226	315	709	**2 629**
2012[r]	494	132	219	142	987	1 220	236	305	548	**2 309**
2013	403	138	180	118	839	1 050	186	291	612	**2 139**

Note: 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

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Source: Jamaica Constabulary Force, Police Statistics Department

TABLE 20.5i
IMMIGRATION TO JAMAICA, 2009–2013

YEARS	RETURNED RESIDENTS	INVOLUNTARY RETURNED MIGRANTS	COMMONWEALTH CITIZENS	ALIENS	TOTAL
2009	1 316	3 076	4 696	1 197	**10 285**
2010	1 134	2 825	3 487	1 275	**8 721**
2011	1 068	2 629	3 495	1 318	**8 510**
2012	957	2 309	3 426[r]	5 457[r]	**12 149[r]**
2013	839	2 139	3 105	5 950	**12 033**

r - revised

Note: 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
Ministry of Foreign Affairs and Foreign Trade Jamaica Customs
Jamaica Constabulary Force, Police Statistics Department.

– international migration and protection of the human rights of all migrants

– territorial inequality, spatial mobility and vulnerability

– frameworks for the implementation of the future regional agenda on population and development.

Mainstreaming Migration into Development

It is important that international migration be mainstreamed into development to accommodate the increasing complexity of migratory patterns and its impact on countries, migrants and families. Mainstreaming migration can be viewed as the most practical and suitable method to reap the benefits of migration and to militate against negative consequences. The process of mainstreaming also ensures that international migration and development issues are included in policies, plans and programmes at all levels in various sectors including education, labour, social protection and health services. Once managed by appropriate policies, international migration will contribute to sustainable development by providing remittances, strengthening bilateral relations and agreements, and by the transfer of knowledge and human capital for socio-economic growth and development. The bottom-up and interactive processes adopted in the formulation of the National Policy and Plan of Action on International Migration and Development have been highlighted as a best practice in the Global Forum on Migration and Development (GFMD). It was featured at the UN High-Level Dialogue on International Migration and Development in October 2013.

The draft National Policy and Plan of Action on International Migration and Development aims to respond to key global developments which have revealed, over time, the need to address the broad and evolving range of challenges and opportunities associated with migration. It supports the view that "international migration is adequately measured, monitored and influenced to serve the development needs of Jamaica" as outlined in the **Vision 2030 Jamaica.** The policy recognized that Jamaica is a country of origin, transit and destination and that migration will stimulate the creation of new economic opportunities in destination countries through the transfer of human, social, cultural and financial capital. It also recognized that a relationship exists between migration and the economic, social and cultural conditions in developing countries such as Jamaica. The policy was completed in 2013 and submitted to Cabinet for approval.

Modernization Programme of the Civil Registration and Vital Statistics System (CRVS)

The Government of Jamaica (GOJ) recognized that the reliable collection of vital data, and its accurate and timely processing into vital statistics, is a critical element in its planning and service provision; and a useful tool for measuring compliance with the Millennium Development Goals (MDGs) among other key instruments. The focus for 2013 was mainly on strengthening capacity and improving the quality of data within the system. The major accomplishments were, namely:

i) Completion of a Death Evaluation Study

a.The study entitled "Quality and Completeness of Death Registration: Jamaica 2008" was commissioned and addressed the complex process of death registration. The data generated served to inform and describe the epidemiology and history of diseases in a population. By identifying at-risk populations, mortality data will guide public health policy, resource allocation, planning and monitoring of interventions.

ii) Jamaica Constabulary Force (JCF) Data Collection

a.The JCF completed the digitization of 60 000 death records pertaining to sudden and violent death.

iii) Human Resources and Training

a.Through capacity building training the CRVS staff expanded. This enabled them to perform the tasks associated with their positions and provided them with the requisite tools to develop professionally. In November, International Statistical Classification of Diseases and Related Health Problems 10th Revision (ICD-10) training sessions were conducted to improve the proficiency of mortality and morbidity coders in the use of the ICD-10 Manual.

Jamaica Diaspora Conference

In June, Jamaica staged the 5th Biennial Diaspora Conference in Montego Bay under the theme **"Nation on a Mission: Jamaica–Diaspora Partnership for Development".** The conference was attended by some 1 500

participants and has been dubbed the largest since it first began in 2004. The two main areas of focus at the conference were:

1) Business, Trade and Investment

2) Philanthropy, Social Investment and Diaspora Diplomacy, which are aligned with the national goals of Vision 2030 Jamaica.

This is consistent with the overall thrust to strengthen diaspora engagement and facilitate their involvement in national development. The objectives of the conference were to:

- initiate business, trade, investment and venture capital deals
- present strategies to consolidate and expand contributions from the Diaspora in healthcare and education
- develop strategies for Jamaica to expand the contribution of the Diaspora in social investment
- explore strategies for Jamaica to work in collaboration with the Diaspora to address polices legislated by their host countries, which may also have implications for Jamaica
- document major recommendations and actions to guide the development of a Post Conference Implementation Council and Plan of Action.

In response to the needs of the Diaspora and to engender cohesiveness amongst private and public stakeholders, the government established the Diaspora Conference Implementation Council (DCIC) with the primary responsibility to implement recommendations and action plans stemming from the conference. The council comprises a wide crosssection of activities, from facilitating data sharing among stakeholders and agencies to coordinating and monitoring of the work done by ministries, departments and agencies on diaspora matters as well as planning for subsequent Diaspora conferences.

The achievements to date include:

i) Commencement of a Diaspora Mapping Project funded by the International Organization on Migration (IOM)

ii) Development of a draft Diaspora Policy

iii) Launch of the Diaspora Youth Connect.

OUTLOOK

The Post-2015 Development Agenda

As the life of the Millennium Development Goals (MDGs) draws to a close, the international community is preparing to engage in an inter-governmental process to determine the elements of the Post-2015 Development Agenda. The process will draw on assessments of the successes, failures and lessons learned from the MDGs. This agenda will be developed through a participatory process involving the member states.

Consultations will begin in 2014 to prepare a national Outcome Document outlining Jamaica's position for the Post-2015 Development Agenda. The country's position on the Post-2015 Development Agenda will reflect the goals, outcomes, strategies and the priority actions of the National Development Plan, as well as the most recent assessment of Jamaica's performance in relation to the Millennium Development Goals (MDGs). The Outcome Document will be the negotiating framework for all national delegations to the upcoming meetings on the Post-2015 Development Agenda.

Phase 2 Mainstreaming Migration into National Development Planning Project

The Phase 2 Mainstreaming Project will commence on February 1, 2014 and end in 2017. The project is geared towards supporting greater institutional coherence and capacity development, needed to sustain a multi-stakeholder approach to entrenching migration and development. Activities will be centred on ensuring that the implementation of the priorities outlined in the National Policy and Plan of Action on International Migration and Development are adequately supported. Activities in Phase 2 (2014–2017) will be data driven and as such Phase 2 will emphasize the importance of the mining and measurement of core indicators. Some of the major activities will include:

- implementation plan for the National Policy and Plan of Action on International Migration and Development
- completion of draft Diaspora Policy
- update of Migration Profile
- capacity development for ministries, departments and agencies (MDAs).

Global Forum on Migration and Development 2013–2014

Jamaica is anticipated to participate in the 7th Global Forum on Migration and Development (GFMD) which will be held on May 14–16, 2014 in Stockholm, Sweden under the theme "Unlocking the Potential of Migration for Inclusive Development".

The main areas of focus will be:

i) Integrating migration in global, regional and national development agendas

ii) Migration as an enabler for inclusive economic development

iii) Migration as an enabler for inclusive social development.

Launch of International Conference on Population and Development National Report

The International Conference on Population and Development (ICPD) Beyond 2014 Jamaica National Report: Review and Appraisal of the Implementation of the ICPD Programme of Action will be launched in 2014. The launch will highlight the progress achieved, areas where no progress has been made, along with priority areas identified for the Post-2015 Development Agenda.

Jamaica Diaspora Policy

This policy will seek to transform the relationship between Jamaica and its Diaspora into a more strategic and deepened engagement for mutual benefits. It will provide the institutional and policy framework for diaspora engagement necessary to address key issues and concerns affecting to the development of Jamaicans at home and abroad. Ultimately, the Diaspora Policy will aim to integrate diaspora related issues into government policies, plans and programmes and to provide the enabling environment to facilitate different government agencies and private and civil society organizations.■

CHAPTER 21

THE LABOUR MARKET

INTRODUCTION

The Jamaican labour market continued to be shaped by economic and demographic shifts which strongly influenced labour market outcomes. Macroeconomic uncertainty continued to dominate the labour market landscape while population ageing continues to have both positive and negative implications for the labour market. Labour market policies continued to be guided within the context of the Vision 2030 Jamaica – National Development Plan, the Medium-Term Socio-Economic Policy Framework, and the International Labour Organization's Decent Work Agenda. Demographically, the labour force was demonstrative of natural growth characterised by population ageing and a low absorptive capacity within the labour market as there was evidence of growth in the general population of both the working age population (15–64 years) and the elderly population (60+ years) {see chapter on Population}.

The labour force exhibited a 2.1 per cent growth to 1 308 650 with 713 525 males outnumbering females in the labour force. The average employment level grew by 0.5 per cent in 2013 relative to 2012. The International Labour Organization (ILO) reports[1] that globally, the unemployment rate remained unchanged at 6.0 per cent with approximately 202.0 million persons being unemployed globally, an increase of 5.0 million[2]. At the same time, there is a need for some 30.0 million jobs in order to return to pre-crisis employment levels. Locally, the labour market was again plagued by rising unemployment, with an increase of 1.3 percentage points to 15.2 per cent. Both youth and adult unemployment rates displayed upward movements to 37.7 per cent and 11.6 per cent, respectively, with female unemployment being higher in both cases.

Employment increased in the Services Industry to 746 375. Employment in the Goods Producing Industry declined to 362 675. There was a turnaround in the Construction industry which increased to 83 025, resulting from work on the North-South leg of Highway 2000 and ongoing construction projects in the tourism sector (see chapter on Construction).

Some 768 325 persons remained outside the labour force for varied reasons, with the majority of those being female (60.2 per cent). The percentage of persons in the labour force without training was 68.0 per cent relative to 69.0 per cent in 2012, with males accounting for the majority of those untrained. An estimated 4.6 per cent reported receiving on-the-job training.

The Ministry Paper 106/13 entitled "The Implementation of Flexible Work Arrangements in Jamaica" was tabled in Parliament in September. For the implementation of flexible work arrangements, amendments to about 24 pieces of legislation are under way.

In response to the rise in unemployment stemming from economic challenges, the government adopted various strategies to address these issues. One strategy was the implementation of the Jamaica Emergency Employment Programme (JEEP), which has employed approximately 40 000 persons cumulative up to September 2013. This initiative which was launched in March 2012 is geared at addressing the unemployment status of Jamaicans in the low socio-economic stratum, and persons with special needs and low skill level. JEEP, a short-term employment project, is not only aimed at low-skilled persons but also included teacher aides and other categories of workers. Employment was provided through several ministries, departments and agencies such as the Ministry of Labour & Social Security (MLSS), the National Housing Trust, the Ministry of Education, the Ministry of Agriculture and the parish councils. It was reported that some 200 employers have provided employment through the MLSS and the Youth Upliftment Through Employment (YUTE) Build job training programmes.

In addition to the abovementioned strategies, the government also sought to improve the effectiveness of the Electronic Labour Exchange (ELE). Work was done toward the expansion and enhancement of the ELE to develop a National Employment Portal through public–private partnership to increase employment opportunities.

LABOUR FORCE AND EMPLOYMENT

The analysis presented in this section is based on data from the Labour Force Surveys conducted by the Statistical Institute of Jamaica (STATIN). As such, STATIN's official definitions are used for all concepts, unless otherwise stated. The focus of the analysis is on changes in the main labour force indicators using averages of the quarterly surveys.

The Labour Force

The labour force consists of persons 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". The number of persons in the labour force increased by 2.1 per cent to 1 308 650. This increase can be attributed to the youth population transitioning from school to

1 ILO estimates for 2013 are preliminary.

2 International Labour Office, *Global Employment Trends 2014: Risk of a jobless recovery?* (Geneva: International Labour Organization, 2014).

TABLE 21.1
MAIN LABOUR FORCE INDICATORS BY SEX, 2012–2013
('000)

MAIN INDICATORS	2012[r] January	April	July	October	Annual Average	2013[p] January	April	July	October	Annual Average
BOTH SEXES										
Labour Force	1 281.6	1 283.6	1 278.5	1 283.9	1 281.9	1 297.6	1 322.5	1 309.7	1 304.8	1 308.7
Employed Labour Force	1 099.5	1 098.7	1 111.2	1 104.0	1 103.4	1 110.0	1 107.4	1 108.1	1 110.7	1 109.1
Unemployed Labour Force	182.1	184.9	167.4	179.9	178.6	187.5	215.1	201.6	194.0	199.6
Unemployment Rate (%)	14.2	14.4	13.1	14.0	13.9	14.5	16.3	15.4	14.9	15.2
Job-Seeking Rate (%)	9.0	8.8	8.2	9.4	8.7	9.5	10.0	9.7	9.9	9.8
Labour Force Participation Rate	61.9	62.0	61.7	61.9	61.9	62.5	63.7	63.0	62.8	63.0
MALE										
Labour Force	703.4	700.5	702.3	705.7	702.9	708.7	716.1	715.7	713.6	713.5
Employed Labour Force	628.4	624.0	632.7	631.4	629.1	633.5	630.3	632.1	637.8	633.4
Unemployed Labour Force	75.0	76.4	69.7	74.4	73.8	75.2	85.9	83.6	75.8	80.1
Unemployment Rate (%)	10.7	10.9	9.9	10.5	11.0	10.6	12.0	11.7	10.6	11.0
Job-Seeking Rate (%)	6.9	7.0	6.3	6.9	7.0	7.3	8.0	7.6	7.2	7.5
Labour Force Participation Rate	69.3	68.9	69.1	69.4	69.0	69.6	70.3	70.2	69.9	70.0
FEMALE										
Labour Force	578.2	583.1	576.2	578.2	578.9	588.9	606.4	594.0	591.2	595.1
Employed Labour Force	471.1	474.7	478.5	472.6	474.2	476.5	477.1	476.0	472.9	475.6
Unemployed Labour Force	107.1	108.5	97.7	105.5	104.7	112.3	129.2	118.0	118.2	119.4
Unemployment Rate (%)	18.5	18.6	17.0	18.3	18.0	19.1	21.3	19.9	20.0	20.0
Job-Seeking Rate (%)	11.6	11.0	10.7	12.5	11.0	12.4	12.5	12.3	13.2	13.0
Labour Force Participation Rate	54.9	55.3	54.6	54.8	55.0	55.7	57.3	56.1	55.8	56.3

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

work, more elderly persons remaining in the labour force beyond retirement age, as well as those persons once reported to be outside the labour force now being incorporated into the labour force. This reflected an increase of 10 550 males and 16 200 females (see Table 21.1). The Jamaican labour force continued to be comprised of majority males with 54.5 per cent relative to 54.8 per cent in 2012 as women migrate for economic reasons just as often, if not more often than men[3], and were the majority of emigrants (see chapter on Population). Also, a higher percentage of females remained outside the labour force for varying reasons compared with males.

The labour force participation rate, which expresses the labour force as a percentage of the population 14 years and over, increased to 63.0 per cent from 61.9 per cent, a 1.1 percentage point increase. Both the male and female participation rate increased, to 70.0 per cent and 56.3 per cent, respectively. The labour force continued to be comprised mainly of persons within the 25–34 and the 35–44 age groups (see Table 21.2). Persons in the 25–44 age group accounted for 50.4 per cent of the total labour force. The number of adult participants (25 years and over) increased by 1.3 per cent to 1 105 850 persons while the number of youth participants (14–24 years)[4] also increased, by 3.4 per cent to 202 800.

Persons outside the labour force[5] are defined as individuals 14 years and over who were not classified as employed or unemployed in the survey. A total of 768 325 persons were outside the labour force, a decline of 2.7 per cent relative to 2012. Females accounted for 60.2 per cent of persons outside the labour force. This is largely due to there being more females "Staying Home with Dependents" (18 600), carrying out "Home Duties" (2 875) and "Pregnant" (4 250). There were more females (289 825) choosing not to work compared with males (162 650) in addition 150 more females (109 750) attended school full-time and part-time. Persons outside the labour force were primarily in the 14–19 age group (38.2 per cent) and the 65 years and over age group (20.9 per cent). The persons outside the labour force were concentrated in two categories — 58.8 per cent reported they "Did Not Want to Work" while 24.4 per cent reported being "At School Full Time". Other reasons for persons being outside the labour force included being "Incapable of Working" (48 775), and suffering from "Illness" (14 150).

3 International Organization for Migration, *Migration in Jamaica: A Country Profile 2010* (Geneva: IOM, 2012).

4 The Labour Force Survey captures persons from 14 years and consequently, any rates for the youth cohort will be calculated for persons aged 14 to 24 years.

5 Included in this category are all persons 14 years or older who were neither employed nor unemployed, full-time students up to the secondary level, persons engaged in home duties, persons incapable of working, and persons not wanting or not available for work.

TABLE 21.2
LABOUR FORCE BY AGE GROUP AND SEX, 2012–2013
(`000)

	2012[r]					2013[p]				
AGE	**January**	**April**	**July**	**October**	**Annual Average**	**January**	**April**	**July**	**October**	**Annual Average**
BOTH SEXES										
TOTAL	**1 281.6**	**1 283.6**	**1 278.5**	**1 283.9**	**1 281.9**	**1 297.6**	**1 322.5**	**1 309.7**	**1 304.8**	**1 308.7**
14-19	37.8	38.2	30.7	34.8	35.4	39.8	41.4	34.3	35.4	37.7
20-24	162.6	159.7	162.7	157.8	160.7	155.9	169.7	171.1	163.6	165.1
25-34	335.1	337.5	339.0	340.4	338.0	341.8	346.0	344.6	345.9	344.6
35-44	309.0	307.3	306.9	307.0	307.6	310.7	317.7	317.4	313.4	314.8
45-54	247.8	250.8	250.9	253.3	250.7	251.5	251.4	255.8	251.5	252.6
55-64	128.6	133.8	130.7	131.2	131.1	136.0	134.9	129.1	131.2	132.8
65 and over	60.7	56.3	57.6	59.4	58.5	61.9	61.4	57.4	63.8	61.1
MALE										
TOTAL	**703.4**	**700.5**	**702.3**	**705.7**	**702.9**	**708.7**	**716.1**	**715.7**	**713.6**	**713.5**
14-19	23.4	23.6	18.5	21.7	21.8	23.0	25.4	21.5	22.1	23.0
20-24	89.5	86.4	90.5	89.9	89.1	88.6	92.8	96.8	91.9	92.5
25-34	177.1	176.3	178.8	179.5	177.9	179.4	179.2	179.6	180.1	179.6
35-44	157.4	159.1	158.6	157.1	158.1	156.9	161.5	162.0	160.1	160.1
45-54	134.7	135.3	135.7	136.1	135.5	137.3	136.1	138.4	136.3	137.0
55-64	77.9	79.1	79.4	79.1	78.9	81.5	79.5	78.4	78.9	79.6
65 and over	43.4	40.7	40.8	42.3	41.8	42.0	41.6	39.0	44.2	41.7
FEMALE										
TOTAL	**578.2**	**583.1**	**576.2**	**578.2**	**578.9**	**588.9**	**606.4**	**594.0**	**591.2**	**595.1**
14-19	14.4	14.6	12.2	13.1	13.6	16.8	16.0	12.8	13.3	14.7
20-24	73.1	73.3	72.2	67.9	71.6	67.3	76.9	74.3	71.7	72.6
25-34	158.0	161.2	160.2	160.9	160.0	162.4	166.8	165.0	165.8	165.0
35-44	151.6	148.2	148.3	149.9	149.5	153.8	156.2	155.4	153.3	154.7
45-54	113.1	115.5	115.2	117.2	115.3	114.2	115.3	117.4	115.2	115.5
55-64	50.7	54.7	51.3	52.1	52.2	54.5	55.4	50.7	52.3	53.2
65 and over	17.3	15.6	16.8	17.1	16.7	19.9	19.8	18.4	19.6	19.4

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

Overall, 68.0 per cent of the labour force reported having received no training compared with 68.9 per cent in 2012. Of the remainder, 13.5 per cent (176 225) was reported as Professionals with a Degree or Diploma relative to 12.3 per cent in 2012, while 0.5 per cent (6 525) was Professionals without a Degree or Diploma. Eleven per cent (143 200) received Vocational Training with Certificate, while, 1.1 per cent (14 675) received Vocational Training without Certificate. Approximately 5.0 per cent received on-the-job training, an increase to 60 675 from 58 375 in 2012.

The data indicated that males without training (40.8 per cent) continued to outnumber females (27.2 per cent) without training. By contrast, females accounted for 6.5 per cent of those with certified vocational training and 8.6 per cent of Professionals with a Degree or Diploma compared with 4.5 per cent and 4.9 per cent, respectively, for males. More males (37 625), however, received on-the-job training compared with females (23 050).

Employment

Global employment estimates grew by 1.4 per cent in 2013, resulting from increased growth in South Asia, while the Latin American and Caribbean region recorded a deceleration in employment[6]. The average employment level locally, grew by 0.5 per cent to 1 109 050 persons, resulting in an employment rate of 84.8 per cent. This increase was due partly to the recovery of the economy. Both the male and female employed labour force increased by 4 300 and 1 400 persons, respectively (see Table 21.3). Despite these increases, males continued to dominate the employed labour force at 57.1 per cent.

Employment by Age and Sex

During the year, the number of employed youth declined by 3.2 per cent to 126 250 (see Table 21.3). The number of employed male youth declined from 81 525 persons in 2012 (0.7 per cent) to 80 900 persons and, like their counterpart, the

6 International Labour Office, *Global Employment Trends 2014: Risk of a jobless recovery?* (Geneva: International Labour Organization, 2014).

TABLE 21.3
EMPLOYED LABOUR FORCE BY AGE GROUP AND SEX, 2012–2013
(`000)

SEX AND AGE	2012[r] January	April	July	October	Annual Average	2013[p] January	April	July	October	Annual Average
MALE	628.4	624.0	632.7	631.4	629.1	633.5	630.3	632.1	637.8	633.4
Youth (14-24 yrs.)	83.7	80.4	81.2	80.8	81.5	79.3	82.5	83.5	78.3	80.9
Adults (25 yrs. and over)	544.7	543.6	551.5	550.6	547.6	554.2	547.8	548.6	559.5	552.5
25-34	155.9	156.6	159.4	159.2	157.8	160.6	155.6	155.9	161.8	158.5
35-44	144.6	145.0	149.4	146.6	146.4	145.9	149.9	152.0	150.3	149.5
45 yrs. and over	244.2	242.0	242.7	244.8	243.4	247.7	242.3	240.7	247.4	244.5
FEMALE	471.1	474.7	478.5	472.6	474.2	476.5	477.1	476.0	472.9	475.6
Youth (14-24 yrs.)	50.3	49.7	50.9	45.0	48.9	45.2	47.3	43.2	45.7	45.4
Adults (25 yrs. and over)	420.8	425.0	427.6	427.6	425.3	431.3	429.8	432.8	427.2	430.3
25-34	124.8	125.9	129.7	128.5	127.2	126.9	126.9	130.3	128.3	128.1
35-44	129.8	127.2	128.5	131.1	129.2	130.9	132.6	131.7	129.1	131.1
45 yrs. and over	166.2	171.9	169.4	168.0	168.9	173.5	170.3	170.8	169.8	171.1
TOTAL	**1 099.5**	**1 098.7**	**1 111.2**	**1 104.0**	**1 103.4**	**1 110.0**	**1 107.4**	**1 108.1**	**1 110.7**	**1 109.1**

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

number of employed female youth decreased from 48 975 persons (7.4 per cent) in 2012 to 45 350.

Employment among adults averaged 982 800, an increase from 972 850. The group showing the largest increase was the 25–34 age group followed by the 35–44 age group. All age groups increased, with the exception of the 20–24 and 45–54 age groups which declined by 4 725 and 1 175, respectively. Among females, employment also declined, in the 45–54, and the 14–19 age groups, while males showed declines in the 20–24 and 65 and over age groups.

Employment by Employment Status

There was a reduction in the number of Paid Government Employees by 500 (0.3 per cent) to 146 700. This may be due to natural attrition. The private sector — comprised of Paid Non-Government Employee, Unpaid Worker, Employer, and Own Account Worker — registered growth of 0.4 per cent to 958 375 in the number of employed persons (Table 21.4). The ratio of private-sector-worker to public-sector-worker was approximately 6.5:1. Females accounted for the majority of workers in the public sector, 58.9 per cent compared with 60.6 per cent in 2012.

TABLE 21.4
EMPLOYED LABOUR FORCE BY EMPLOYMENT STATUS, 2012–2013
(`000)

EMPLOYMENT STATUS	2012[r] January	April	July	October	Annual Average	2013[p] January	April	July	October	Annual Average
Paid Government Employee	145.2	148.8	147.9	146.9	147.2	145.4	145.5	147.8	148.1	146.7
Paid Non-Government Employee	512.0	496.2	507.2	502.4	504.5	502.9	509.6	507.1	513.3	508.2
Unpaid Worker	11.6	12.1	9.5	12.4	11.4	15.2	15.1	13.3	12.4	14.0
Employer	37.0	33.0	39.6	36.2	36.5	37.2	34.3	34.2	32.6	34.6
Own Account Worker	392.9	406.2	405.5	404.0	402.2	401.7	399.7	402.8	402.1	401.6
Not Reported	0.8	2.4	1.5	2.1	1.7	7.6	3.2	2.9	2.2	4.0
TOTAL	**1 099.5**	**1 098.7**	**1 111.2**	**1 104.0**	**1 103.4**	**1 110.0**	**1 107.4**	**1 108.1**	**1 110.7**	**1 109.1**

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

In the private sector, males accounted for 59.5 per cent of the employed. There were increases in the number of Paid Non-Government Employees by 0.7 per cent to 508 225 and the number of Unpaid Workers by 0.2 per cent to 14 000. Both Own Account Workers and Employers showed declines of 0.1 per cent and 5.1 per cent, respectively. The group, Paid Non-Government Employees accounted for the largest proportion (45.8 per cent) of employed persons. This was followed by Own Account Workers (36.2 per cent) and Paid Government Employees (13.2 per cent).

Employment by Industry

An increase in overall employment resulted from an increase in employment in the Services Industry, which accounted for 67.0 per cent of total employment and experienced employment growth to 743 500 from 736 375. Employment in the Goods Producing Industry declined from 364 050 to 362 675 (see Table 21.5).

A 6.6 per cent decline in the number of persons employed in the Manufacturing sub-industry — from 76 950 in 2012 to 71 875 — led to an overall decline in the Goods Producing Industry despite increases in all other sub-industries. Employment increased in Agriculture, Hunting, Forestry & Fishing by 0.6 per cent to 202 375; and in Mining & Quarrying by 11.3 per cent to 5 400. Unlike in 2012, employment in the Construction sub-industry rebounded, and increased by 2.4 per cent to 83 025, as construction work on the North–South leg of Highway 2000 and expansion and renovation work within the tourism sector took place during the year (see chapter on Construction).

The Services Industry registered increases in: Electricity, Gas & Water Supply by 9.4 per cent to 8 450; Real Estate, Renting and Business Activities by 14.2 per cent to 65 900; Wholesale and Retail, Repair of Motor Vehicle and Equipment by 0.07 per cent to 221 525. The largest percentage increase occurred in the Health & Social Work sub-industry, which grew by 15.3 per cent to 32 625. This could be attributed to increases in the number of physicians and nurses along with the expansion in primary health-care services (see chapter on Health). By contrast, employment in the Financial Intermediation sub-industry reduced by 1.0 per cent to 26 000 persons; Hotels and Restaurant Services by 0.6 per cent to 75 750; and Private Households with Employed Persons by 6.2 per cent to 54 825. These movements resulted in a net gain to the Services Industry of 7 125.

The Wholesale & Retail, Repair of Motor Vehicle & Equipment; and Agriculture, Hunting, Forestry & Fishing industries continued to be the two largest employers in 2013, with the former accounting for 20.0 per cent and the latter, 18.2 per cent. Construction remained the third largest employer, accounting for 7.5 per cent of employment.

Employment by Occupation Group

Four occupation groups registered increased employment. These were: Professionals, Senior Officials & Technicians, by 2.7 per cent to 244 850; Skilled Agriculture & Fishery Workers,

TABLE 21.5
EMPLOYED LABOUR FORCE BY INDUSTRY, 2012–2013
(`000)

	2012[r]					2013[p]				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
I GOODS PRODUCING INDUSTRY	**363.2**	**365.6**	**368.3**	**359.2**	**364.1**	**362.6**	**363.7**	**361.1**	**363.3**	**362.7**
Agriculture, Hunting, Forestry & Fishing	198.0	201.7	200.3	204.8	201.2	200.9	205.9	202.7	200.0	202.4
Mining & Quarrying	4.9	3.8	4.7	6.1	4.9	5.3	4.7	5.4	6.2	5.4
Manufacturing	83.5	78.1	76.9	69.3	77.0	74.8	70.9	68.2	73.6	72.0
Construction	76.8	82.0	86.4	79.0	81.1	81.6	82.2	84.8	83.5	83.0
II SERVICES INDUSTRY	**733.2**	**730.8**	**739.8**	**741.7**	**736.4**	**742.7**	**740.8**	**745.8**	**744.7**	**743.5**
Electricity, Gas & Water Supply	8.2	6.7	8.1	7.9	7.7	8.3	7.8	8.7	9.0	8.5
Wholesale & Retail, Repair of Motor Vehicle & Equipment	228.3	217.1	218.6	221.4	221.4	226.5	234.1	213.4	212.1	221.5
Hotels & Restaurant Services	71.5	72.9	81.2	79.4	76.3	79.7	68.1	74.9	80.3	75.8
Transport, Storage & Communications	72.8	70.6	76.1	72.8	73.1	72.3	69.7	75.0	73.7	72.7
Financial Intermediation	25.9	31.6	23.9	23.7	26.3	26.1	28.6	24.6	24.7	26.0
Real Estate, Renting & Business Activities	57.1	57.4	58.7	57.6	57.7	62.1	64.9	70.0	66.6	65.9
Public Administration & Defence; Compulsory Social Security	56.2	63.6	59.6	58.6	59.5	55.2	53.6	61.0	56.8	56.7
Education	69.5	66.3	69.2	74.4	69.9	70.6	72.1	68.1	73.8	71.2
Health & Social Work	29.8	27.4	29.8	26.2	28.3	30.8	31.0	34.1	34.6	32.6
Other Community, Social and Personal Service Activities	53.9	55.6	58.5	63.6	57.9	55.3	56.9	59.9	59.7	58.0
Private Households with Employed Persons	60.0	61.6	56.1	56.1	58.5	55.8	54.0	56.1	53.4	55.0
III INDUSTRY NOT SPECIFIED	**3.1**	**2.5**	**3.1**	**3.1**	**3.0**	**4.7**	**2.9**	**1.2**	**2.7**	**2.9**
TOTAL	**1 099.5**	**1 098.9**	**1 111.2**	**1 104.0**	**1 103.4**	**1 110.0**	**1 107.4**	**1 108.1**	**1 110.7**	**1 109.1**

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

TABLE 21.6
EMPLOYED LABOUR FORCE BY OCCUPATION GROUP, 2012–2013
(`000)

OCCUPATION GROUP	2012[r] January	April	July	October	Annual Average	2013[p] January	April	July	October	Annual Average
Professionals, Senior Officials & Technicians	226.2	238.0	245.5	243.6	238.3	248.0	241.9	239.6	249.9	244.8
Clerks	90.6	95.2	96.3	89.4	92.9	92.1	100.9	101.9	102.2	99.3
Service Workers and Shop & Market Sales Workers	235.5	226.6	215.8	225.9	226.0	233.9	223.1	218.9	215.3	222.8
Skilled Agricultural & Fishery Workers	195.4	197.7	199.3	200.0	198.1	194.4	201.3	202.9	198.2	199.2
Craft & Related Trades Workers	143.1	140.9	149.6	135.3	142.2	133.6	139.3	141.8	136.8	137.9
Plant & Machine Operators & Assemblers	66.0	62.0	56.2	60.1	61.1	65.8	57.7	60.9	64.7	62.3
Elementary Occupations	140.7	137.3	147.5	148.4	143.5	140.5	141.7	142.1	142.9	141.8
Occupation not specified	2.0	1.0	1.0	1.3	1.3	1.7	1.5	0.0	0.7	0.9
TOTAL	**1 099.5**	**1 098.7**	**1 111.2**	**1 104.0**	**1 103.4**	**1 110.0**	**1 107.4**	**1 108.1**	**1 110.7**	**1 109.1**

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

TABLE 21.7
UNEMPLOYMENT BY MAJOR DEMOGRAPHIC GROUPS, 2012–2013
('000)

	2012[r] January	April	July	October	Annual Average	Rate (%)	2013[p] January	April	July	October	Annual Average	Rate (%)
TOTAL	**182.1**	**184.9**	**167.4**	**179.9**	**178.6**	**13.9**	**187.5**	**215.1**	**201.6**	**194.0**	**199.6**	**15.2**
Youth (14-24 yrs.)	66.5	68.0	61.4	66.8	65.7	33.4	71.4	81.2	78.7	75.1	76.6	37.7
Adults (25 yrs. and over)	115.6	116.9	106.0	113.1	112.9	11.1	116.1	133.9	122.9	118.9	123.0	11.1
MALE	75.0	76.4	69.7	74.4	73.9	10.5	75.2	85.9	83.6	75.8	80.1	11.0
Youth (14-24 yrs.)	29.2	29.7	27.9	30.9	29.4	26.5	32.4	35.6	34.9	35.8	34.7	30.0
Adults (25 yrs. and over)	45.8	46.7	41.8	43.5	44.5	7.5	42.8	50.3	48.7	40.0	45.4	7.6
FEMALE	107.1	108.5	97.7	105.5	104.7	18.1	112.3	129.2	118.0	118.2	119.4	20.0
Youth (14-24 yrs.)	37.3	38.3	33.5	35.9	36.2	42.5	39.0	45.6	43.8	39.3	41.9	48.0
Adults (25 yrs. and over)	69.8	70.2	64.2	69.6	68.5	13.9	73.3	83.6	74.2	78.9	77.5	15.2

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

by 0.5 per cent to 199 200; Clerks, by 6.9 per cent to 99 275; and Plant & Machine Operators by 1.9 per cent to 62 275. Conversely, there were declines in employment in the three remaining occupation groups: Service Workers, Shop & Market Sales Workers, by 1.4 per cent to 222 800; Elementary Occupations, by 1.2 per cent to 141 800; and Craft & Related Trades Workers, by 3.0 per cent to 137 875 (see Table 21.6).

Employment in four occupation groups was dominated by males and these were: Plant & Machine Operators & Assemblers (94.5 per cent or 58 825 persons); Craft & Related Trades Workers (91.3 per cent or 125 875 persons); Skilled Agricultural & Fishery Workers (82.4 per cent or 72 275 persons); and Elementary Occupations (51.0 per cent or 72 275 persons). Though males continued to account for the majority of the employed labour force, females maintained a higher representation in the following occupation groups: Clerks (74.7 per cent or 74 175 persons); Service Workers and Shop & Market Sales Workers (60.1 per cent or 133 975 persons); and Professionals, Senior Officials & Technicians (60.0 per cent or 147 100 persons).

TABLE 21.8
JAMAICANS EMPLOYED IN NORTH AMERICA UNDER THE OVERSEAS EMPLOYMENT PROGRAMME BY SEX AND TYPE OF EMPLOYMENT, 2012–2013

	US Farm Work Programme		US Hospitality Programme		Canadian Farm & Factory Programme		Canadian Skilled Worker/ Hospitality Programme		TOTAL	
	2012	2013	2012	2013	2012	2013	2012	2013	**2012**	**2013**
MALE	3 524	4 627	451	622	5 993	6 944	126	157	**10 094**	**12 350**
FEMALE	2	1	685	796	378	269	185	306	**1 250**	**1 372**
TOTAL	**3 526**	**4 628**	**1 136**	**1 418**	**6 371**	**7 213**	**311**	**463**	**11 344**	**13 722**

Source: Ministry of Labour and Social Security

Unemployment

Unemployment, in keeping with the standard (relaxed)[7] international definition, refers to persons who are without work and currently available for work, whether actively looking for work (seekers) or not (non-seekers). Total unemployment grew by 20 975, an increase of 11.7 per cent compared with the previous year. Consequently, the annual average unemployment rate increased to 15.2 per cent from 13.9 per cent (see Table 21.8). The increase in unemployment is as a result of the increase in the labour force. Female unemployment remained higher than male unemployment and increased to 20.0 per cent from 18.0 per cent. Females once again accounted for the majority (59.8 per cent) of the total unemployed labour force.

Unemployment levels increased across all age groups with the exception of the 55–64 age group. The increase in unemployment among those in the 20–24 years age group increased by 9 100 followed by the 25–34 years age group, which increased by 4 975. The level of unemployment increased by 10 125 among persons in the prime working age (25–54 years). The unemployed labour force comprised 76 600 youth and 122 950 adults, representing an increase of 16.6 per cent and 8.9 per cent, respectively. The youth unemployment rate increased by 4.3 percentage points to 37.7 per cent, while the adult unemployment rate increased by 0.8 percentage point to 11.1 per cent. In 2013, female youth (48.0 per cent) and female adult (15.2 per cent) unemployment rates remained higher than the male youth (30.0 per cent) and male adult (7.6 per cent) rates.

Labour Migration

Labour migration remained a prevailing feature of the Jamaican labour market as it is thought to aid in keeping unemployment levels low. The Ministry of Labour and Social Security (MLSS) provides oversight for the inflow and outflow of workers through their Work Permit and Overseas Employment Programme departments. While there are a number of labour migration programmes in operation, the Ministry's Overseas Employment Programme is the chief managed labour migration scheme.

Overseas Employment Programme

The Overseas Employment Programme administered by the MLSS, aims to place suitably qualified Jamaicans in employment in the United States of America (USA) and Canada. The US Farm Work; the US Hospitality; the Canadian Farm & Factory Workers; and the Canadian Hospitality & Skilled Workers programmes all constitute the Overseas Employment Programme. Labour migration continued to demonstrate its positive effect on the economy. The overall number of persons participating in the overseas programmes increased by 21.0 per cent to 13 722 participants (see Table 21.8). The MLSS reported that a total of 263 workers were "absent without leave" (AWOL), a decline from 325 in 2012.

Employment in the Canadian Farm and Factory Programme outstripped employment in the US Farm Programme by 2 582 to register 7 213, a 13.2 per cent increase from 6 371. Despite this, the US Farm Programme experienced increased employment from 3 526 to 4 628. Both the Canadian Skill/Hotel Workers Programme and the US Hotel Workers Programme showed increased employment, from 311 and 1 136 to 463 and 1 418, respectively.

The Overseas Employment Programme continued to be male dominated, accounting for 12 350 of the total 13 722. Males also made up the majority of participants in the US Farm Work and the Canadian Farm and Factory Programmes, 99.9 per cent and 96.3 per cent, respectively. Females however, were the main recipients of employment opportunities in the US Hospitality Programme (56.1 per cent) and the Canadian Skilled Workers/Hospitality Programme (66.1 per cent).

The Overseas Employment Programme has traditionally made provision for workers to remit a portion of their earnings under a savings plan, which is monitored by the MLSS. The remittance facilities under the Canadian programmes indicated a decline by 6.5 per cent to Cn$15.4 million.

Work Permits

Under the Foreign Nationals and Commonwealth Citizens (Employment) Act 1964 — also known as the Work Permit Act — foreign nationals who wish to be employed in Jamaica must first apply to the MLSS for a work permit[8].

7 The international standard (strict) definition of unemployment refers to persons who in the reference period were "without work"; currently "available for work"; and "seeking work". The relaxed definition allows for the relaxation of the "seeking work" criterion in certain situations.

8 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.

A total of 4 258 work permits were approved by the MLSS, an increase of 27.6 per cent compared with 2012. Of the total number of approvals, 2 674 applications were categorized as new, an increase of 48.5 per cent; while 1 584 applications were categorized as renewals, an increase of 3.1 per cent. The data indicated that a larger proportion of work permits (78.4 per cent) approved by the MLSS continued to be in favour of males compared with females (21.6 per cent).

The Wholesale & Retail, Repair of Motor Vehicle & Equipment Industry recorded the most work permit approvals with 37.6 per cent (1 563), followed by Construction and Installation with 27.8 per cent (1 185) and Hotels & Restaurants Services with 18.7 per cent (798), while Public Administration and Defence; Compulsory Social Security recorded the least number of work permit approvals accounting for 0.1 per cent (4).

A total of 1 471 exemptions were granted, a decrease of 11.9 per cent compared with 2012. The largest number of exemptions was granted to CARICOM Nationals with degrees from selected CARICOM universities as well as musicians, media personnel, artists and sports persons (30.0 per cent). There were declines in the number of exemptions approved for persons covered by the 14- or 30-day clause[9] from 339 to 299; employees at the University of the West Indies (UWI) from 10 to 0; employees at the University Hospital of the West Indies (UHWI) from 8 to 6; Foreign wives of Jamaican husbands from 230 to 122; Foreign husbands of Jamaican wives from 143 to 116; and Persons employed by statutory bodies/government from 354 to 222; however, Ministers of Religion remained at 265 the same as the previous year.

LABOUR MARKET REFORM

The MLSS continued to lead the process of labour market reform, with the examination of several labour legislations. The following legislations were reviewed:

- amendment to Bill for the Holidays with Pay Order was drafted
- draft Occupational Safety and Health Bill was received and discussions held with the Chief Parliamentary Counsel (CPC)
- proposed amendments to the Labour Officers (Powers) Act 1943 to facilitate the Occupational Safety and Health Bill as well as to increase fines and penalties
- proposed amendments to the Employment (Equal Pay for Men and Women) Act to strengthen the provisions outlined, which was forwarded to stakeholders for review
- proposed amendments to the Workmen Compensation Act to strengthen the provisions set out therein.

In keeping with the Treaty of Chaguaramas, the Caribbean Community (Free Movement of Skilled Persons) Bill was passed to expand the categories of persons that can move freely within CARICOM; increase fines and penalties; and introduce a fee for the Certificate of Recognition of Caribbean Community Skills.

In relation to the flexible work arrangements, the Ministry Paper 106/13 entitled "The Implementation of Flexible Work Arrangements in Jamaica" was tabled in Parliament in September. Drafting instructions to facilitate amendments to the various pieces of legislation to enable flexi-work arrangements was issued to the CPC.

In addition to the above reform efforts, the MLSS also carried out work relating to the ratification of the ILO Domestic Workers Convention, 2011 (No.189) and the Maritime Labour Convention, 2006. Consultations were held and cabinet submissions drafted.

WAGES, SALARIES AND BENEFITS

Earnings in Large Establishments

The analysis in this section is based on the aggregation of the findings of the "Employment, Earnings and Hours Worked in Large Establishments" quarterly survey conducted by STATIN. The survey was conducted in firms employing 10 or more persons in all industries excluding Agriculture, the public sector, private educational institutions and the Free Zones.

Average weekly earnings for all workers (wage and salaried) increased by 3.8 per cent[10] to $20 398.00. These increases however, should be considered against the background of a 9.5 per cent inflation rate in 2013. The highest average weekly wage was earned by workers in the Electricity, Gas & Water sub-industry ($38 786.00), followed by the Mining sub-industry ($30 248.00). By contrast, the lowest average earnings was reported in Manufacturing ($15 840.00). Increases in weekly earnings were evident in five of the eight industries, namely: Manufacturing (by 4.8 per cent); Electricity, Gas & Water (by 5.7 per cent); Trade, Hotels & Restaurants (by 6.9 per cent); Transport, Storage & Communications (by 7.3 per cent); and Community, Social & Personal Services (by 9.0 per cent).

Public Sector Settlements

The estimated public sector wage bill for fiscal year (FY) 2013/14 was $157.3 billion, which was a 6.7 per cent average percentage change relative to the previous fiscal year ($146.1 billion). Projections for FY 2014/15 indicate an increase to $161.2 billion, an average percentage change of 2.5 per cent. The increase in the wage bill was as a result of payment of the third and fourth tranches of arrears related to the implementation of the 7.0 per cent increase under the Third Memorandum of Understanding (MOU III) between the Government of Jamaica (GOJ) and the Jamaica Confederation of Trade Unions (JCTU). Other attendant reasons for the increase included the payment of the final tranche for the reclassification of teachers; the payment of new rates and retroactive payments for Education Officers; payment of new rates associated with the reclassification of health sector jobs; and the payment of the $25 000.00 one-off sum to qualified public sector workers.

Minimum Wage

The National Minimum Wage Act 1975 was developed to protect workers who do not have union representation. The minimum wage rate is defined as the lowest wage, permitted by

9 Under the 14- or 30-day clause, special provision is made for skilled professionals and technicians employed for a short period in the monitoring and maintenance of plants, equipment and machinery to operate without a work permit.

10 2012 data revised to include December quarter.

TABLE 21.9
INDUSTRIAL DISPUTES AND WORK STOPPAGES BY INDUSTRY AND CAUSE, 2012–2013

INDUSTRY	WAGES & CONDITIONS OF EMPLOYMENT				BARGAINING RIGHTS				DISMISSALS AND SUSPENSIONS				MISCELLANEOUS [a]				ALL CAUSES			
	2012		2013		2012		2013		2012		2013		2012		2013		2012		2013	
	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.	Ind. Disp.	Work Stops.
	1	0	7	0	0	0	1	0	8	0	2	0	1	0	2	1	10	0	12	1
Agriculture, Hunting, Forestry & Fishing	2	0	1	0	1	0	0	0	5	0	3	0	1	0	4	0	9	0	8	0
Mining & Quarrying	9	2	4	1	5	0	4	0	19	0	37	0	2	0	2	0	35	2	47	1
Manufacturing	3	0	3	0	1	0	1	0	5	0	8	0	1	1	4	0	10	0	16	0
Electricity, Gas and Water Supply	1	0	1	0	0	0	0	0	1	0	3	0	1	0	1	1	3	0	5	1
Construction	4	0	0	0	2	0	1	0	50	0	21	0	2	0	0	0	58	0	22	0
Wholesale & Retail, Repair of Motor Vehicle & Equipment	0	0	0	0	0	0	1	0	0	0	22	0	0	0	1	0	0	0	24	0
Hotels & Restaurants Services	2	0	2	0	0	0	3	0	21	0	20	0	7	1	6	0	30	1	31	0
Transport, Storage and Communication	11	0	3	3	4	0	2	0	74	0	19	0	10	1	7	0	99	1	31	3
Financial Intermediation	0	0	3	0	0	0	5	0	0	0	87	0	0	0	8	0	0	0	103	0
Real Estate, Renting & Business Activities	0	0	4	0	0	0	0	0	0	0	13	1	0	0	11	1	0	0	28	2
Public Administration & Defence; Compulsory Social Security	0	0	3	0	0	0	0	0	0	0	29	0	0	0	7	0	0	0	39	0
Education	0	0	0	0	0	0	0	0	0	0	12	0	0	0	5	1	0	0	17	1
Health & Social Work	7	0	0	0	6	0	0	0	47	0	4	0	16	2	0	0	76	2	4	0
Other Community, Social and Personal Service Activities	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	0	0	2	0
Private Households with Employed Persons	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Industry Not Specified (Incl. Extra-Territorial Bodies)																				
All Industries	40	2	31	4	19	0	18	0	230	0	282	1	41	5	58	4	330	6	389	9

Notes: Ind. Disp. - Industrial Disputes
Work Stops. - Work Stoppages
a - Miscellaneous includes issues involving lay-offs, redundancies and end-of-project compensation

Source: Ministry of Labour and Social Security

TABLE 21.10
TOP TEN HOT JOBS IN THE JAMAICAN LABOUR MARKET, 2013

JOB TITLE	NUMBER OF ADVERTISEMENTS
Sales Representative	1 934
Teacher/Lecturer	977
Manager	941
Security Guard/Gatekeeper	692
Driver/Delivery Rider	569
Supervisor	518
Bartender/Waiter	442
Domestic Helper/Housekeeper	426
Cashier	390
Chef/Cook/Baker	334
TOTAL	**7223**

Source: Ministry of Labour and Social Security

law, that a worker can be paid. The National Minimum Wage rate remained at $5 000.00 per 40-hour week or $125.00 per hour, and for industrial security guards it was $7 320.40 per week or $183.01 per hour. Allowances for industrial security guards remained unchanged and were as follows: laundry allowance at $33.30 per hour; firearm allowance at $36.60 per hour; and dog handler's allowance at $24.63 per hour. Life insurance for security guards was $2.0 million.

The Minimum Wage Advisory Commission (MWAC) completed islandwide consultations in 2013 in relation to the adequacy of the existing minimum wage. Submissions from various private and public sector organizations, individuals, trade unions and worker associations were also made to the MWAC regarding the level of the national minimum wage. Based on these deliberations, it was announced by the MLSS that an increase in the national minimum wage will become effective in early 2014.

LABOUR MANAGEMENT RELATIONS

This section focuses on labour management relations, which involve the government, employers and workers responding to industrial disputes. Given the importance of a stable industrial climate for investment and increased productivity, one of the mandates of the MLSS is to effectively promote peaceful labour management relations, and health and safety at the workplace.

Industrial Disputes and Work Stoppages

The number of reported industrial disputes increased by 17.8 per cent to 389 (see Table 21.9) during the year. The main causes of these disputes included: Dismissals/Suspensions at 282; and Wages & Conditions of Employment which declined from 40 to 31, while miscellaneous causes[11] increased to 58. The Real Estate, Renting & Business Activities industry accounted for the largest proportion of reported industrial disputes with 103 of the 389 (26.4 per cent), followed by the Manufacturing and the Education industries with 12.0 per cent and 10.0 per cent, respectively.

During the period, approximately 27 trade unions were involved in industrial disputes. The Bustamante Industrial Trade Union (BITU) and the National Workers' Union (NWU) were involved in most industrial disputes and took part in 32 and 29 disputes, respectively; 234 disputes involved non-unionized individuals.

Work stoppages increased to nine from six. Of that amount, there were three work stoppages in the Financing Intermediation industries followed by two in the Public Administration & Defence & Compulsory Social Security industry (see Table 21.9). Wages & Conditions of Employment resulted in the majority of work stoppages. The NWU was involved in one work stoppage and the BITU involved in two, while the Jamaica Civil Service Association (JCSA) was involved in one. The Union of Clerical and Supervisory Employees (UCASE) was involved in two work stoppages jointly with the NWU.

Under Section 9 (5) of the Labour Relations and Industrial Relations Disputes Act 1975 (LRIDA), industrial action undertaken by an essential service is deemed legal under certain circumstances. Like 2012, the past year has seen a continued decline in work stoppages in the essential services, from two to one, with the sole work stoppage occurring in the health sector.

The number of man-days lost as a result of work stoppages increased to 7 652 from 900. The number of workers involved also increased to 2 325 from 450. Both the Financing Intermediation and Manufacturing industries experienced significant increases in the highest average number of man-days lost, to 4 170 and 1 464 from 60 and 594, respectively.

Dispute Resolution – Conciliation and Arbitration

Under the LRIDA, there are three stages in settling disputes in the non-essential services. The first stage is that both parties should attempt to reach an amicable agreement on their own. The second stage involves the submission of a written report of the dispute by either party to the MLSS, where attempts are made to settle the dispute through conciliation. If the parties are unable to reach a settlement at this stage, the dispute may be referred by the Minister with responsibility for Labour to the Industrial Disputes Tribunal (IDT) for settlement by arbitration. During the year, 47 disputes were referred to the IDT with Dismissals & Suspensions accounting for 39, Wages & Conditions of Employment accounting for 5, while 3 were categorized as Miscellaneous[12]. Awards for 19 disputes were handed down by the IDT, while nine disputes were settled by agreement and seven were withdrawn.

Occupational Safety and Health

In relation to its mandate, the MLSS is responsible to oversee and enforce the Factories Act 1943. In pursuance of this, representatives of the MLSS conduct routine inspections of factories, docks, cargo ships docked in Jamaican ports, and building sites in which persons are employed to ensure the safety of workers through the maintenance of at least minimum safety and health standards.

A total of 2 464 inspections were conducted during the year compared with 2 207 in 2012. Total building inspections increased to 353 from 251; on the other hand, ship inspections

11 Miscellaneous causes include vacation leave, pension benefits, demotions and unpaid bonuses.

12 Miscellaneous includes emergency duty allowance, payments for strike periods and issuance of letters of reprimand.

TABLE 21.11a
GROWTH IN SELECTED TOTAL ECONOMY INDICATORS, 2008-2012

Period	Value Added Output	Employment	Employment Hours	Wage Rate	Unit Labour Cost	Output per Worker	Output per Hour Worked	Total Factor Productivity
2008	-0.9	-0.5	-0.4	-4.3	-3.9	-0.4	-0.5	-1.0
2009	-3.2	-3.5	2.8	0.5	0.1	0.3	-5.8	-1.2
2010	-1.5	-1.4	-2.0	-6.0	-5.9	-0.1	0.5	-0.6
2011	1.4	-1.1	-1.5	1.1	-1.3	2.4	2.9	2.0
2012	-0.2	1.7	0.8	-1.5	0.4	-1.9	-0.9	-0.9
2008-2012 Average	-0.9	-1.0	-0.1	-2.0	-2.1	0.1	-0.8	-0.3

Source: Jamaica Productivity Centre

TABLE 21.11b
LABOUR PRODUCTIVITY GROWTH RATES BY INDUSTRY, 2008–2012

	2008	2009	2010	2011	2012	2008–2012 Average
I GOODS PRODUCING INDUSTRY						
Agriculture, Forestry & Fishing	-10.2	10.8	5.2	23.8	-2.4	5.4
Mining & Quarrying	-6.2	-6.2	15.1	20.2	-27.7	-1.0
Manufacture	2.4	4.5	-4.2	9.7	-5.8	1.3
Construction	5.1	3.1	1.4	2.3	2.9	3.0
II SERVICES INDUSTRY						
Electricity & Water Supply	18.4	-7.7	6.0	-9.4	0.9	1.6
Wholesale & Retail Trade; Repair and Installation of Machinery	0.6	-1.3	-4.4	1.4	-5.0	-1.7
Hotels and Restaurants	1.7	6.3	8.8	-2.7	0.3	2.9
Transport, Storage & Communication	-3.9	5.5	-0.7	-2.2	0.8	-0.1
Financial & Insurance Services	-11.0	-5.1	-6.2	4.3	-4.0	-4.4
Real Estate, Renting & Business Activities	-3.9	-1.8	-8.9	-11.9	3.0	-4.7
Producers of Government Services	-2.3	3.4	0.7	-6.6	-0.4	-1.0

Source: Jamaica Productivity Centre

decreased from 190 to 180. Inspection of registered factories increased to 1 498 from 1 471 while inspection of unregistered factories declined from 287 to 262; and inspection of docks to 15 from 13.

In response to complaints made to the MLSS, 10 special investigations were conducted, a decline from 15. The MLSS continued to carry out its responsibility to investigate breaches of safety provisions and reported accidents that prevent an employee from working for three or more days, or result in disability or death. The number of accidents reported increased to 320 from 258, of which 181 accidents qualified for investigation. Of the 181 accidents that warranted investigation, 83 were investigated. The number of job related deaths increased to 8 from 3. The ministry reported that 1 743 factories were registered in 2013, with 1 216 being re-registered factories. There were however, 3 175 active factory files. The Manufacturing industry accounted for the majority of registered factories (1 134), while the Transport, Storage & Communication Industry registered the least number of factories (20).

LABOUR MARKET INFORMATION

The Ministry of Labour and Social Security continued to provide labour market information through the **Labour Market Information System (LMIS),** which comprised three components: Labour Market Intelligence, the Electronic Labour Exchange (ELE), and the Skills Bank. The MLSS worked in collaboration with the Inter-American Development Bank (IDB) to strengthen the LMIS and the ELE to increase human capacity and institutional capacity. The conclusion of phase one, to enhance the LMIS website making it more user-friendly for both job seekers and employers, was completed and dialogue is in progress to formulate phase two of the project. The ministry conducted a Labour Market Study for 2012 in order to ascertain the labour market needs of employers islandwide. The study targeted employers, human resources managers and other senior officers from major industries and was completed and disseminated to over 700 key stakeholders.

The analysis of "hot occupations" in the Jamaican labour market centres on the jobs/vacancies most frequently advertised in the main local newspapers and online job placement sites and is a feature of the LMIS website. Table 21.10 outlines the top ten advertised vacancies throughout the year. Sales Representative (1 934) was the most advertised vacancy followed by Teacher and Lecturer with 977, a decline from 1 321 in 2012. Security Officer and Driver were high in demand, the fourth and fifth most advertised vacancies with 692 and 569, respectively. The least number (334) of advertised vacancies was recorded for Chef.

The ELE is an online service that seeks to provide effective matching of job-seekers with prospective employers. A total of

1 922[13] job-seekers registered with the ELE in 2013 compared with 2 865 in 2012, a decrease of 32.9 per cent. During the year, the number of vacancy notifications[14] increased by 6.0 per cent to 509 from 480. Consequently, there was a decline in the number of persons placed in jobs; with 178 job-seekers being placed compared with 215 placements in the preceding year.

The Planning Institute of Jamaica (PIOJ) in collaboration with the Labour Market Information Technical Advisory Committee (LMITAC) and the Inter-American Development Bank (IDB) hosted its 5th annual Labour Market Forum in December, under the theme "Reshaping the Jamaican Labour Market to Foster Economic Growth and Development". The forum over the course of two days featured presentations on Informality in Jamaica; Economic Growth Through Labour Market Reforms: Necessary Conditions; Building a Culture of Productivity; Human Resource Imperatives of Labour Market Reform; and studies funded by the IDB such as Pension Coverage in Jamaica; the Labour Market Study 2012 done by the MLSS, among others.

PRODUCTIVITY

The Jamaica Productivity Centre (JPC) focused on three broad priority areas in keeping with its mandate to improve productivity and competitiveness of the Jamaican economy. These were:

- promoting a national productivity-conscious culture
- providing research and advocacy for policies that will accelerate productivity growth, competitiveness and economic development
- facilitating productivity improvement in private and public sector organizations.

In fulfilling its mandate to promote productivity, the JPC hosted its fifth National Productivity Awareness Week under the theme "Productivity: Pathway to Competitiveness and Growth-Getting from 2013 to 2030". The week of activities included a business exposition, poster competition and two days of conference. The JPC also continued its "Be Productive" campaign in secondary and post-secondary institutions along with a mass media public education campaign to promote the importance of productivity to national development. The centre also focused on providing technical assistance and training to several organizations, including firms participating in the Jampro Export Max Programme. Additionally, progress was made in implementing the European Union and Government of Jamaica funded Energy Services Company (ESCO) project. The project seeks to remove or reduce the institutional, regulatory, capacity and awareness barriers that have prevented the development of a viable Energy Services Company in Jamaica.

Table 21.11a provides a summary of the performance of several Total Economy Indicators over the period 2008–2012. First, labour productivity or output per worker over the review period increased at an average rate of 0.1 per cent annually. This resulted from average annual output growth of -0.9 per cent, relative to growth in employment of 1.0 per cent. For the five-year period, labour productivity was positive only in 2009 and 2011 when growth of 0.3 per cent and 2.4 per cent, respectively, were recorded. Second, total hours worked declined on average by 0.1 per cent annually, while output per hour worked (a preferred measure of labour productivity) declined at an average rate of 0.8 per cent per annum. Third, unit labour cost, which describes the labour cost competitiveness of the Jamaican economy, declined on average by 2.1 per cent per annum. This resulted from an average decline in real wage rate of 2.0 per cent annually compared with output per worker which increased, on average, by 0.1 per cent annually. Fourth, total factor productivity (TFP) is a measure of output growth that is not explained by labour and capital. It therefore, represents a residual that takes into account the influence of factors such as technology, innovation, labour quality, attitudes of workers, workplace systems and processes, management and even luck. During the review period TFP declined on average by 0.3 per cent annually. This means that the economy produced 0.3 per cent less output annually because non-traditional factors of production such as workforce skills, governance and investment climate contributed to a decline in labour and capital productivity.

A summary of labour productivity growth rates by industry for the period 2008–2012 is displayed in Table 21.11b. The Goods Producing industries that recorded positive average annual labour productivity growth were Agriculture, Forestry & Fishing (5.4 per cent); Construction (3.0 per cent); and Manufacture (1.3 per cent). In contrast, Mining & Quarrying was the only Goods Producing Industry recording a decline in labour productivity (-1.0 per cent annually).

Only two of the seven Service industries experienced positive labour productivity. These were Hotels and Restaurants (2.9 per cent) and Electricity and Water Supply (1.6 per cent). The remaining five Service industries recorded negative labour productivity growth.

OUTLOOK

Out of the Labour Market Forum hosted by the LMITAC and the PIOJ, the establishment of a commission to undertake work related with labour market reform was recommended. The upcoming year will see work being done on the development of a comprehensive labour market reform agenda, which will focus on Education & Training; Social Protection; Productivity, Innovation & Technology; Industrial Relations; and labour market policies and legislation. This reform agenda will be based on the goals of Vision 2030 Jamaica – National Development Plan and the ILO Decent Work Agenda. This reform effort will build on the process started over a decade ago by the Labour Market Reform Committee in the 1990s.

In keeping with the recommendations of the Labour Market Reform Committee, the implementation of flexible work is expected by the end of the second quarter of FY 2014/15. The implementation will culminate with the amendment of the 24 pieces of legislation to facilitate flexible work arrangement. Also, the Occupational Safety and Health Act is expected to be enacted in 2014.

It is anticipated that the establishment of three HEART workforce colleges will address issues relating to the mismatch and gaps between training and the labour market. Also, the findings of the completed School-to-Work Transition Survey conducted by STATIN on behalf of the ILO and the MLSS are expected to inform policy and programme development toward integration of the large proportion of youth who are unemployed or outside the labour force. The MLSS is expected

13 Data provided are provisional.

14 Vacancy notifications refer to vacancies reported to the ELE by employers, to be filled by registered job-seekers.

to carry out dissemination activities in early 2014 to apprise the public of the findings of the survey.

The projected wage bill for FY 2014/15 is expected to increase by 2.5 per cent to $161.2 billion due to continued payment of arrears which is slated to end in 2014. It is anticipated that the public sector will continue to undergo an extended wage freeze in light of the IMF Extended Fund Facility and the Heads of Agreement between the Government of Jamaica and the Jamaica Confederation of Trade Unions and Staff Associations which represent public sector workers.

Employment is expected to continue growing in the coming year, specifically in the construction industry and tourism sector with construction work ongoing on the North–South leg of Highway 2000; the Courtyard by the Marriot Hotel; and the Playa Hotels & Resorts. With job creation high on the government's agenda, the employment tax credit scheme was introduced in the latter part of 2013 as part of the tax reform package. Two objectives of the employment tax are to encourage employers to hire more persons along with promoting greater tax compliance. It is hoped that this tax credit will also aid in boosting employment in the coming year.■

EDUCATION AND TRAINING

INTRODUCTION

During 2013, the major priorities of the Ministry of Education (MoE) continued to be in the areas of Early Childhood Development, Special Education, Media and ICT in Education, Teacher Quality, Tertiary Education and the Infusion of Technical Vocational Education and Training (TVET) in the school system. Other areas of focus included the elimination of the shift system, the introduction of a High School Diploma Equivalency Programme for adult learners, and the strategic alignment of Science, Technology, Engineering and Mathematics (STEM) in schools using age-appropriate methodologies.

Under the ICT in Education component, Cabinet approved the allocation of $1.4 billion from the Universal Service Fund to finance the acquisition of tablets for schools. The National Parenting Support Commission was established and became operational in June 2013 to oversee the implementation of the National Parenting Support Policy.

There were improved students' performances in national and regional examinations. These included the Grade Four Literacy Test, the Grade Six Achievement Test (GSAT), the Caribbean Secondary Education Certificate (CSEC) and the Caribbean Advanced Proficiency Examination (CAPE). Another improvement was in the total percentage of trained university graduates across all public schools at all levels, this increased to 52.0 per cent from 48.0 per cent in 2012. The goal of the MOE is to have all teachers trained and certified to the degree level by 2020.

For the 2013/2014 Fiscal Year (FY) the Government of Jamaica (GOJ) increased its allocation to $85.7 billion to the MoE for recurrent and capital expenditure, representing 17.1 per cent of the National Budget. The sector also received financial and other support from corporate entities, the Diaspora, as well as alumni associations and other groups. Greater emphasis was placed on forging partnerships for the sustainable and effective delivery of the education product. The Government committed itself to an arrangement under the International Monetary Fund Extended Fund Facility which proposes to reform expenditure in education with emphasis on the balancing of student-teacher ratio within and between schools, and improving the funding structure of the student loan scheme to facilitate increased access to tertiary level training.

An estimated 75.0 per cent (806 332 persons) of the school-age cohort (3–24 years old) were enrolled for the 2012/13 academic year. The total number of students enrolled in the public and private education institutions at the pre-primary, primary and secondary levels was 655 855. The primary level accounted for 33.4 per cent of the total (Figure 22A). A comparative analysis with the previous academic year showed that there was improvement in access at the Post-Secondary level. The Gross Enrolment Rate (GER) for the cohorts was as follows: 99.9 per cent at pre-primary, 99.4 per cent at primary, and 91.9 per cent at secondary. At the tertiary level, gross enrolment was 28.9 per cent. In training institutions, the number of persons trained in the Professional, Senior Officials and Technicians category was 16 595 (69.3 per

TABLE 22.1a
ESTIMATES OF EXPENDITURE BY FUNCTION AND PROGRAMME, 2012/13 - 2013/14
$M

PROGRAMME	REVISED ESTIMATE 2012/13			ESTIMATED 2013/14		
	RECURRENT	CAPITAL	TOTAL	RECURRENT	CAPITAL	TOTAL
Central Administration	1 126 975	1 147 454	2 274 429	1 403 139	1 229 638	2 632 777
Early Childhood Education	2 449 615	189 550	2 639 165	2 676 055	98 530	2 774 585
Primary Education	27 597 456	481 140	28 078 596	29 223 436	145 924	29 369 360
Special Education	1 050 485	3 000	1 053 485	1 114 101	-	1 114 101
Secondary Education	30 916 207	26 332	30 942 539	32 198 951	13 500	32 212 451
Tertiary Education	14 069 567	206 614	14 276 181	14 673 035	216 626	14 889 661
Adult Education	232 241	-	232 241	259 996	-	259 996
Common Educational Services	1 796 167	-	1 796 167	1 989 970	-	1 989 970
Library Services	893 548	-	893 548	922 633	4 200	926 833
Students Nutrition	-	33 806	33 806	-	18 100	18 100
Disaster Management		190 000	190 000			
TOTAL Education Budget	80 132 261	2 277 896	82 220 157	84 461 316	1 726 518	86 187 834
Disaster Management Appropriations in Aid	-976 744	-69 585	-1 046 329	-450 000	-	-450 000
TOTAL MoE BUDGET	**79 155 517**	**2 208 311**	**81 363 828**	**84 011 316**	**1 726 518**	**85 737 834**

Source: Estimates of Expenditure, 2013/14; Suplementary Estimates, 2013/2014
Allocations for nutrition are distributed across all levels from early childhood to secondary.

cent female) while 65 646 persons (61.0 per cent female) were trained as skilled and semi-skilled personnel.

SECTION 1: FINANCING

Financing for education was provided by GOJ allocations, as well as contributions from the private sector, households, community and faith-based organizations. Household contributions to education were made through the payment of auxiliary fees at the secondary level, cost sharing at the tertiary level, and other payments for education-related inputs at all levels. For FY 2013/14, the GOJ, in its supplementary budget, allocated to the MoE $85.7 billion, a 5.4 per cent increase compared with the allocation provided in 2012/13 (Table 22.1a). Approximately $84.0 billion of the government allocation was for recurrent expenditure, with approximately 76.8 per cent of that amount being for salaries and other emoluments.

Of the overall budget for education, 37.6 per cent was allocated to the secondary level; 34.1 per cent to the primary; 17.4 per cent to tertiary; 3.2 per cent to early childhood; and 1.3 per cent to special education. The GOJ's annual per capita expenditure in education for FY 2012/13 was $327 404.00 at the tertiary level; $281 908.00 for special education; $132 009.00 at the secondary level; $104 390.00 at the primary level, and $20 188.00 for early childhood (Table 22.1b).

The majority of the financing for **Early Childhood Education (ECE)** has been traditionally derived from fees and non-governmental support. The GOJ allocation to this sector for the review period was $2.8 billion, covering subsidies for nutrition, salaries and a grant for material. The MOE budget for ECE was supplemented by the CHASE Fund and the Jamaica Social Investment Fund (JSIF). The CHASE Fund provided a total of $202.4 million of which $13.2 million was allocated to Research, $148.0 million to Equipping and Upgrading of Basic School, and $41.3 million to Training and Public Education Programmes. JSIF provided support amounting to $145.4 million to 28 schools with 6 130 students benefiting (see section on Educational Support Programmes and Services).

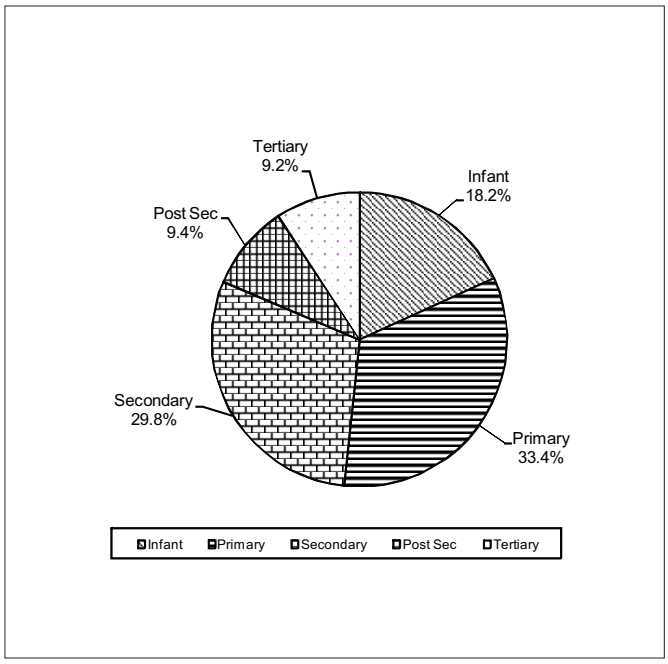

FIGURE 22A: ENROLMENT BY EDUCATION LEVEL (3-24 YEARS), 2012/13

The government allocation to **Primary Education** was $29.4 billion, while to the **Secondary level** it was $32.2 billion (see Table 22.1a). The GOJ continued to assume full responsibility for the tuition of all secondary level students in public institutions. This was in addition to other education-related expenses such as fees for selected subjects[1] at the Caribbean Secondary Education Certificate (CSEC), school feeding support and provision of text books. Parents contributed to auxiliary and other developmental fees at this level.

A total of $1.1 billion was expended on **Special Education**[2] programmes. Some $35.0 million of the recurrent budget was disbursed through non-government organisations (NGOs). At the **Tertiary level**, $14.9 billion was allocated as follows: University of the West Indies (UWI), $7.7 billion; University of Technology, Jamaica (UTech), $1.9 billion; Community Colleges/Multi-disciplinary Colleges[3], $2.5 billion; and Teacher Training Colleges, $1.6 billion. The remainder of $1.2 billion was used as allocations for scholarships, boarding grants and other grants issued to the National Council on Education and for Direction and Administration.

Capital expenditure, by the GOJ, declined by 22.0 per cent to $ 1.7 billion (see Table 22.1a). Of the overall capital budget, 77.3 per cent went to multilateral and bilateral projects (Capital B). The largest portion of the allocation supported the Education Transformation Systems Programme, the University of Technology Enhancement Project, and the Jamaica Basic Education Project (Figure 22B).

The Students' Loan Bureau (SLB) continued to support tertiary education through its revolving fund which provides tuition loans for qualified Jamaican students at local and overseas tertiary institutions approved by the MOE. Grants are also made by the SLB to loan beneficiaries who have the greatest need. A total of 20 147 applications (70.4 per cent females) was received in 2013, of which 16 215 were approved. The total loan amount approved was $3.4 billion. Additionally, 3 676 of those students received grants amounting to $158.0 million (Table 22.1c). The largest disbursements were to students at UTech (35.2 per cent), followed by the University of the West Indies (UWI), Mona (28.8 per cent); Northern Caribbean University (NCU) (15.6 per cent); and Teachers' Colleges, (10.4 per cent).

The Government provided approximately $24.5 billion[4] to cover direct and indirect costs for public sector training (Table 22.1d). The allocation for training declined by some 4.3 per cent compared with the revised estimates for 2012/13. Training activities included post-secondary, formal and non-formal, and continuing education programmes. The HEART Trust/NTA

1 The Government of Jamaica (GOJ) continues to provide incentives for four subjects—English A, Mathematics, Information Technology and a Science subject (chosen by the student)—while the private sector assists with Principles of Business and Principles of Accounts

2 Programmes in Special Education span the Early Childhood, Primary and Secondary levels.

3 Bethlehem Teachers' College and Moneague Multi-Disciplinary College each has a Teacher's College and a Community College

4 Revised Estimates

TABLE 22.1b
MINISTRY OF EDUCATION
PER CAPITA EXPENDITURE BY EDUCATIONAL LEVEL, 2010/11 - 2012/13
($CURRENT PRICES)

LEVELS	2010/11 REVISED ESTIMATES	2011/12 REVISED ESTIMATES	2012/13 REVISED ESTIMATES
Early Childhood:			
Recognized Basic	12 106	13 833	14 208
Infant	49 524	54 306	60 783
Average Early Childhood	18 886	20 726	20 188
Primary:			
Grades 1-6 of All-Age, Primary	68 867	81 224	84 282
& Junior High, and Primary	95 251	96 544	114 817
Average Primary	87 778	97 095	104 390
Special Education	195 539	243 421	281 908
Secondary:			
High Schools	106 102	115 759	129 801
Technical High	117 365	128 168	132 474
Vocational/Agricultural	391 347	429 087	492 860
Grades 7-9 all of All-Age, Primary & Junior High	124 646	134 435	165 297
Average Secondary Education	102 379	117 248	132 009
Tertiary:			
University of the West Indies	533 646	481 811	538 075
University of Technology, Jamaica	156 846	151 911	149 810
Teachers' Colleges	209 999	236 295	256 848
Multidisciplinary Colleges	141 648	181 004	213 509
Edna Manley College of the Visual and Performing Arts	612 216	686 567	732 849
College of Agriculture, Science and Education	417 605	434 822	492 302
Average Tertiary Education	306 088	303 751	327 404

Note: Average per capita figure for each level include administration, supervision and other costs.
Enrolment figures for Tertiary Education are pro-rated because of differences between the Financial Year and the Academic Year.

Source: Statistics Unit, Ministry of Education

earned revenues of approximately $7.9 billion from the HEART Training Levy and other income-generating activities.

Private entities such as the National Commercial Bank (NCB) Foundation, Scotiabank Jamaica Foundation (SJF), Digicel Foundation (DF), and the Mutual Building Societies Foundation (MBSF) (formed by the Jamaica National and the Victoria Building Societies), contributed to financing for education. Data from **NCB Foundation** showed that a total of $43.4 million was spent on educational for 2012/2013 covering:

– $38.0 million in scholarships and grants to over 250 students.

– $9.5 million to its School Fee Sponsorship Programme for students (4 000) sitting CXC/CSEC Principles of Accounts and Principles of Business examinations.

The **SJF**[5] expended for 2012-2013 a total of $17.0 million. There were eight major achievements/projects in the Education sector with 217 organizations participating and 7 709 beneficiaries.

The **Mutual Building Society Foundation (MBSF)** expended $25.1 million to achieve its targets in the project schools. The five-year $100 million project closed in 2013 and contributed to the development of quality education, improved participation, and performance in CSEC for over 7 000 students in support of social transformation. The primary goal of the MBSF Centres of Excellence Initiative is to contribute to

5 SJF also supported the Private Sector Organization of Jamaica Youth Upliftment through Employment Programme (YUTE); The Scotiabank Chair in Entrepreneurship and Development at the University of Technology and a lead researcher at the International Centre for the Environment and Nuclear Sciences at the University of the West Indies.

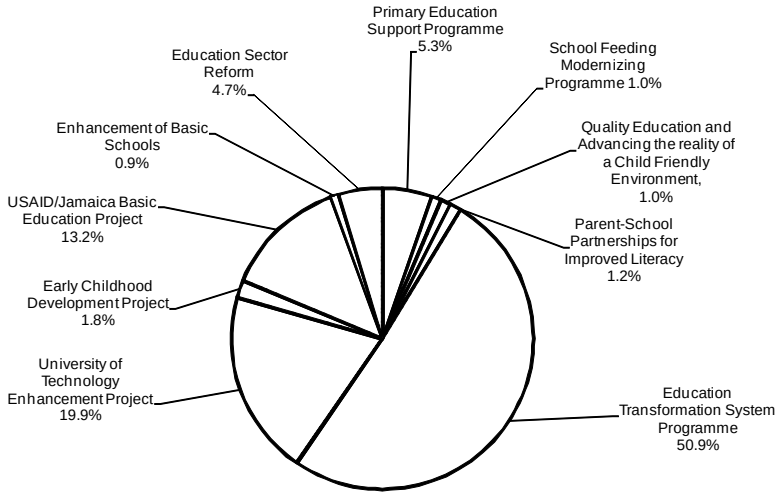

FIGURE 22B: CAPITAL EXPENDITURE (MULTILATERAL/BILATERAL PROGRAMMES), 2013

sustainable national development by improving student achievement and performances, administration and instructional leadership, teacher quality, organisational effectiveness, and to strengthen the school-home-community partnerships of six rural high schools[6].

The Digicel Foundation in FY 2013 funded seven major education projects to the tune of $78.3 million, benefiting 20 729 persons. These projects included:

- 50 enrichment carts valued at $26.4 million were donated.
- Camara Foundation was valued at $10.7 million conducted in 65 schools
- Naz Children's Centre was constructed for $31.0 million
- Enrichment Centre valued at $5.7 million was constructed.

SECTION 2: POLICY

The Education System Transformation Programme (ESTP) pursued its mandate to improve the performance of the education sector by creating systems for greater accountability and improving the quality of delivery of education at all levels. The following table highlights an inventory of selected educational policies and their current status during the last academic year.

SECTION 3: PERFORMANCE

Education Transformation

In an attempt to support ESTP's initiative, funding in the form of grants and loans were received from the World Bank and the Inter-American Development Bank. The ESTP activities were:

BOX 22. 1: MOE Legislations: Policies and Status

Policy	Status
Special Education	Draft submitted for review
National Policy on Independent Schools	Drafted and under review
National Curriculum Policy	Policy is under review
National Assessment Programme	GSAT placement guidlinenes are being reviewed.
Language in Education	Policy document being reviewed
Mathematics and Numeracy	Policy document being reviewed
Technical Vocational Education and Training (TVET) Rationalization Policy	Draft being reviewed for finalization
Re-Integration of School-age Mothers in the Formal Education System	Policy in place
National Parenting Support	Policy in place

Curriculum Teaching & Learning: this component is to improve students' performance at the primary level in Literacy & Numeracy, and improve performance at lower secondary and in CSEC through the Curricularization of the CSEC syllabi (this has been integrated into the work of the Curriculum and Support Services Unit of the Ministry). The following were developments under *Curriculum Teaching and Learning:*

- the curricularization of the CSEC syllabi was undertaken in nine subjects at the Grades 10 & 11 levels and in four subjects at the Grade 7 level
- a National Comprehensive Literacy programme with a full suite of materials to support teaching and learning for all grades up to the end of the primary level was provided for Literacy and Numeracy

6 The six high schools under the programme are McGrath High, St. Catherine; Porus and Mile Gully, Manchester; Godfrey Stewart, Westmoreland; Green Pond, St. James and Seaforth High, St. Thomas.

TABLE 22.IC
STUDENT'S LOAN BUREAU
LOAN AND GRANT APPROVALS, 2012/13 ACADEMIC YEAR

Institutional Types	No. of applications approved (net of cancellations to date)							Loan /Grant Amount ($m)					
	Loan Only		Loan and Grant		Overall Applications			Loan			Grant		
	Male	Female	Male	Female	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**
UTECH	1 111	1 778	352	688	1 949	3 411	**5 360**	436	749	**1 186**	17	34	**51**
UWI,Mona	679	1 582	329	837	1313	3 051	**4 364**	276	679	**954**	16	41	**57**
UWI,Foreign Based	18	55	6	12	29	85	**114**	8	25	**34**	0.2	0.45	**0.65**
Teachers' Colleges	171	857	100	487	400	1 992	**2 392**	62	288	**350**	2	12	**14**
NCU	179	652	92	459	369	1 402	**1 771**	100	422	**521**	4	22	**27**
Community College	28	147	15	71	88	363	**451**	8	47	**54**	0.4	1.6	**2**
Other	312	500	90	138	653	1 110	**1 763**	106	151	**258**	2	3	**5**
Total	**2 498**	**5 571**	**984**	**2 692**	**4 801**	**11 414**	**16 215**	**996**	**2 360**	**3 357**	**43**	**115**	**158**

NOTE: Of the 20 147 applications that were completed and submitted online, 237 were declined while 4 099 students to date have communicated their desire to have the loan cancelled

Source: Student's Loan Bureau

– additional specialist support for Literacy was provided through the USAID funded Basic Education Project. The arrangement for added support of specialists to schools is for a two-year period; it is expected that the skills would be transferred to classroom teachers, for sustainability

– with the implementation of the Competence Based Transition Policy in 2009, the ASTEP was implemented to treat with students who at the end of primary system had not achieved mastery in Literacy at the Grade 4 level. The ASTEP was evaluated and the programme was revised.

Behaviour Management and Community Development

The activity has been fully integrated into the work of the Ministry under the Schools Operations Unit and with support from the Community Relations Education Officers (CREOs) in the Regions and is designed to improve behaviour

TABLE 22.1d
FINANCING FOR TRAINING PROGRAMMES, 2012/13 - 2013/14
($ '000)

Government Allocations	2012/2013 Revised Estimates	2013/2014 Revised Estimates
Technical and Vocational Education (MoE)	2 636	1 012
Tertiary Education	11 157	11 184
Teacher Education & Training	1 541	1 531
In-service Training (MoE)	3	3
Youth Development Services (Ministry of Youth & Culture)	175	110
Training (Ministry of Health)	268	281
Ministry of Youth and Culture	393	407
General Training and Development for the Public Service (MOFPS)	35	32
Fire Brigade	106	55
Tourism Product Development Company	71	73
Management Institute for National Development	303	333
Police Academy	743	747
Jamaica Defence Force (Military Training)	128	105
Caribbean Maritime Institute (Min. of Transp. & Works)	112	126
Ministry of Health	284	281
Ministry of Transport and Works	10	17
Post and Telecommunications Services	14	17
Department of Correctional Services	54	53
Agriculture (RADA)	34	34
Ministry of Science, Technology, Energy and Mining	89	90
Justice Training Institute	35	37
Inservice Training (MOFP)	32	85
Inservice Training (MLSS)	9	5
Special Youth Employment Training (MLSS)	73	40
Abilities Foundation (MLSS)	8	9
Sub-Total	18 313	16 668
HEART Trust/National Training Agency	7 306	7 850
TOTAL	**25 620**	**24 519**

Source: Human Employment and Resource Training Trust/National Training Agency and Estimates of Expenditures, 2013/2014

management, citizenship and safety, and security in schools. Achievements included:

- The Citizenship Education Programme (CEP) with a behaviour management component was developed and rolled out to schools.
- Safety and Security Policy and Manual were developed and the programme implemented in All-Age and Primary and Junior High Schools.

Special Education of ESTP – A comprehensive policy was drafted and recommendations for amendments to the Education Act in respect of Special Education prepared for legislative review. Some of the achievements included:

- "Child Find" (identification of students with special needs) continued in all regions
- The Professional Registry[7] was updated with approximately 360 medical specialists
- Training support for educators to identify and treat with autism was completed to build competencies in behaviour management and instructional practices for children with autism
- Training in positive behaviour support for school-wide discipline was implemented in 18 pilot schools.

Support from the private sector provided over 137 "Enrichment Centres & Carts"[8] in schools to support performance of children with varying types of learning challenges.

During 2013, ***Jamaica Teaching Council (JTC)*** drafted standards for the profession to be used to license teachers. These draft standards are in consultation with major stakeholders. JTC also started the registration of teachers and obtained a Web Portal (www.jtc.gov.jm) to support this effort and to host other on-line offerings. The Council is authorised to regulate and promote the teaching profession through the establishment of standards and a registration & licencing regime for the teaching profession against which teachers can be held accountable, as well as, promote on-going professional development.

The ***Department of School Services (DSS)*** is mandated to provide an effective and efficient school support system and management of educational services delivery at the regional level for improved school performance and accountability. The major deliverables in 2013 were:

- functional profile approved, business processes mapped, Organisational Development (OD) work commenced and monitored and supported by the Modernisation Management Team (MMT) and the Business Process Re-engineering (BPR) Specialists to facilitate the transitioning of the Ministry into a policy-focused Central Ministry and its operational arm, the Department of School Services
- in collaboration with the National Council on Education (NCE) training of school Boards conducted in Regions 1, 3, 5, and 6.

The ***National Education Inspectorate (NEI)*** trained 25 Lead Inspectors and 142 Inspectors in three cohorts to support the work of the NEI. The NEI contracted additional staff to achieve 60.0 per cent of its full complement. Additionally, 308 inspections were conducted during the reporting period, 304 in primary and secondary schools and 4 in Juvenile Correctional Facilities—Rio Cobre Juvenile Correctional Centre, Metcalfe Street Secured Juvenile Centre, Hill Top Juvenile, and Diamond Crest Juvenile facilities. The Chief Inspector's report, which detailed the results of 135 schools inspected in Round 3, was tabled in Parliament in November 2012.

The NEI also established and strengthened strategic partnerships with various stakeholders. It conducted seven post-inspection accountability workshops for Education Officers and school personnel in School Self Evaluation and Data Analysis, made presentations at Quality Education Circle meetings and supported the regional activities of the Department of School Services (DSS). In addition, five staff development and school improvement planning sessions were conducted in schools across Jamaica. Other collaborative efforts included partnering with the Jamaica Teaching Council (JTC) to examine data trends and support to the National College for Educational Leadership (NCEL) in drafting a framework for the assessment of school principals.

The ***National College for Educational Leadership (NCEL***) is mandated to provide for the development of educational leadership capacity. In September 2013, a Director/Principal was appointed. Training of 236 Principals and 16 Education Officers was undertaken and a Principal's Qualification Programme developed in partnership with the University of the West Indies. Work to establish the governance framework, organisational structure and functions, a prior options review and the hiring of the services of an Organisational Development Specialist was finalised.

The ***Jamaica Tertiary Education Commission (J-TEC) is*** an agency of the MOE which provides regulatory oversight to the Tertiary sector. The draft bill has been received by the Chief Parliamentary Council (see Section of Regulatory Bodies for additional information on J-TEC) .

The ***National Parenting Support Commission (NPSC)*** provides support to parents to positively impact their children's development and educational performance, and enhancing the home-school relationship. The Parenting Bill was passed into law at the end of 2012 and the NPSC became operational in 2013.

The ***National Education Trust (NET)*** was established to provide a vehicle for attracting endowment and enabling investment in education. The Trust began with managing the construction of Cedar Grove Academy (a secondary school), and provided oversight to other MoE infrastructural works. Work commenced on the marketing of the entity, following on the Diaspora Conference in May 2013.

Early Childhood Development

ECD programmes target children 0–8 years old. They include programmes for children 0–3 years, the majority of whom is not in early childhood institutions but accessed state health services; children 3–5 years, many of whom attend Early Childhood Institutions; and children 6–8 years, who attend

7 Professional Registry –list of medical professionals who are contracted to the MOE for behavioural interventions

8 Carts are mobile resource centres which are carted to classrooms for teaching & learning

TABLE 22.2
ENROLMENT IN EARLY CHILDHOOD EDUCATION BY SCHOOL TYPE AND YEAR, 2008/09 - 2012/13

YEAR	Infant School		Infant Department		Basic School: Recognized		Basic School: Unrecognized[a]		TOTAL
	No.	Enrolment	No.	Enrolment	No.	Enrolment	No.	Enrolment	
2008/09	31	7 909	98	5 325	1 839	104 780	116	4 490	**122 504**
2009/10	31	7 920	100	5 613	1 839	102 356	117	4 458	**120 347**
2010/11	32	8 113	99	5 526	2 247	118 133	347	14 346	**146 118** [b]
2011/12	32	8 108	103	5 660	2 069	87 621	488	3 970	**132 143**
2012/13	34	8 465	106	5 770	2 661	132 175	0	0	**146 410**

a - Catergory Unrecognized no longer exists (2012/2013
b - This includes 24 042 students enrolled in private day care centres, pre-school and nursery/preparatory schools

Source: Statisics Section, Ministry of Education (ECC Registration Information System)

primary level schools which are governed by the Education Act.

ECD programmes were offered in 2 936[9] Basic/Infant Schools and Departments, and Kindergarten Departments of preparatory schools for children of age 3–5 years. Available data from the Early Childhood Commission (ECC) indicate that a total of 146 410 students in the 3–5 age cohort were enrolled in ECIs (Table 22.2), a 10.8 per cent increase compared with 2012. *The Jamaica Survey of Living Condition (JSLC) 2012* preliminary data indicated that there continued to be high levels of enrolment with a gross enrolment rate[10] of 99.9 per cent (100.0 per cent for boys and 99.7 per cent girls). The sex distribution at this level was almost equal. The ECE level was served by 10 269 teachers[11], with average pupil to teacher ratio being 14:1. Of the number of practitioners, 46.6 per cent had vocational qualifications, 18.7 per cent a diploma in teacher education, 5.7 per cent a bachelor's degree, 1.0 per cent trained at the masters level; and 28.2 per cent of the teachers were untrained. The average daily attendance at this level was 79.4 per cent (80.0 per cent female, 78.7 per cent male).

Developments in the Early Childhood Development Sector

Registration:

The ECC provides monitoring and regulatory services to all institutions with children 0–6 years within the early childhood sector. This is done through a system of registration, inspection and development. Within the EC sector, the Inspector has responsibility for ensuring the compliance of ECIs with the minimum acceptable standards of practice under the Early Childhood Act and Early Childhood Regulations of 2005. To date the ECC has identified 2 525 ECIs operating in Jamaica, of which 2 394 (94.8 per cent) submitted an application for registration. Of that number, the ECC issued 1 404 Permits to Operate.

Training:

Extensive training was undertaken in the period under review. Two main groups were targeted for training: ECC Development Officers/Inspectors and Early Childhood Practitioners (ECPs). See Box 2.

The Classroom Observation Tool (COT) was developed and implemented to determine the level of readiness of EC students with 90.0 per cent usage by Development Officers. Some 18 students completed the first year of the Associate Degree programme in Child Development Therapy at The University of the West Indies.

Primary Education[12]

Primary school enrolment was 269 485, a decline of 5.0 per cent compared with 2012/13 (Table 22.3). The continuing decline in enrolment at this level mirrors the reduction in the size of the primary school-age population (see chapter on Population). The total number enrolled in 792 public schools was 246 105 and an estimated 23 380[13] were enrolled in 141 private schools. Data obtained from the *JSLC 2012* indicated that the gross enrolment rate for the primary level was 99.4 per cent—99.7 per cent boys and 99.5 per cent girls.[14] In the public school system, males accounted for 51.5 per cent of the student population.

Attendance data for the public schools averaged 87.1 per cent compared with 86.2 per cent in 2011/12. The attendance level for girls was 87.8 per cent compared with 86.4 per cent for boys. The national target of the MOE is 85.0 per cent.

9 This does not include Recognized Day Care Centres catering for the 0–3 age cohort and institutions for children with special needs

10 The **gross enrolment rate** (GER) is the ratio of the number of children enrolled at a given level (e.g. in early childhood institutions), whatever their age, to the number in the age cohort officially corresponding to that level (e.g. ages 3–5). The GER is expressed as a percentage. It can exceed 100.0 per cent because of early or, more frequently, delayed enrolment, as well as grade repetition, which result in children other than those of the age cohort being enrolled at a given level.

11 The total does not include teachers in private preparatory schools

12 Primary Education relates to children aged 6–11 in Grades 1–6 of Primary, Primary & Junior High, and All-Age Schools, as well as in private preparatory institutions.

13 Based on estimates in *the Jamaica Survey of Living Condition (JSLC) 2012*

14 The Net Enrolment Rate was 90.8 per cent— Boys, 89.2 per cent and Girls, 92.80 per cent (*JSLC 2010*). Information provided by the MOE Statistics Unit on public schools indicated a gross enrolment rate of 91. 2 per cent with a net enrolment rate of 86.1 per cent.

BOX 22.2 : List of Training Programmes by the Early Childhood Commission 2013

Title of Training	Beneficiaries
Pedagogical Leadership (June 2012 - January 2013)	318 Practitioners, Managers, Development Officers and Inspectors were engaged; an additional 130 ECPs were trained.
Health and Family Life Education (HFLE) (September 2012 and January 2013)	823 practitioners were trained in September and an additional 600 in January by the Guidance and Counselling Unit.
Paediatric First Aid (January – February 2013)	Some 500 ECPs were trained islandwide.
Human Exceptionalities (Special Needs) (January - May 2013)	405 Practitioners were trained in Kingston, St. Catherine, Clarendon, St. James, Manchester and Westmoreland. Training sessions were held with 52 Development Officers and early childhood practitioners in June 2012 in the area of Working with Children with Special Needs.
Interacting with the Young Children (January 2013)	Educators residing in the United States of America, conducted training with 42 ECPs, 5 Inspectors and 6 Development Officers.
Best Practices (January 2013)	Some 93 Principals, 22 ECPs, 4 Development Officers and 14 Principals were trained
ECI Safety	Training provided for 107 practitioners in Early Childhood Institution (ECI) Safety. The practitioners were guided in writing a number of different types od plans - fire safety , disaster management, health and safety and nutrition.
Child Health and Development Passport for 0-6 Year Olds	The MoH in collaboration with the ECC facilitated the training sessions islandwide of 2 309 practitioners in the Use of the Child Health & Development Passport.

At the primary level, the standard pupil to teacher ratio is 35:1, however, for the period under review the average pupil to teacher ratio at this level was 28:1. Some 95.0 per cent of the schools at the primary level were operating with ratios below 35:1. Teachers in public sector primary institutions numbered 10 522, compared with 10 935 in the 2011/12 school year (Table 22.4). Approximately 94.1 per cent of teachers at this level were trained. The level of qualification of teachers in the public education system has been improving over the past five years with the percentage of trained graduates climbing to 54.7 per cent (5 760 teachers) in 2012/13 from 30.1 per cent (3 232 teachers) in 2009. Consistent with previous years, the teaching profession continued to be dominated by females at the Primary level, accounting for 88.8 per cent of the total.

The primary curriculum is being revised and aligned for Grades 1–6. Completed were the Curriculum Framework and work accompanying teachers' guides. The piloting of the curricula is projected for September 2014.

Grades 2 Diagnostic: The Grade Two diagnostic test was developed in 2012 and should replace the current Grade 3 Diagnostic test.

The Grade Four Literacy Test (GFLT)

The MOE has set a target of universal literacy at Grade 4 and 85.0 per cent for numeracy by 2015. In June 2013, a total of 51 480 students sat the GFLT from public, private and special schools. Of this number, 42 673 sat the Test for the first time (38 454 from public schools, 4 165 from private schools and 54 from special schools). Some 76.4 per cent[15] of the 42 619 students (55.0 per cent females) from public and private schools achieved mastery; 17.3 per cent achieved almost mastery and 6.3 per cent non-mastery. Some 35.0 per cent of the 54 students from special schools achieved mastery (68.0 per cent males).

Of the 792 public schools, 788 entered 38 454 students to sit the test with approximately 74.0 per cent attaining mastery (56.0 per cent females); some 19.0 per cent attaining almost mastery and 7.0 per cent non-mastery. Some 224 private schools, with a population of 4 165 students, had 95.7 per cent mastery, 3.8 per cent almost mastery, and 0.5 per cent per cent non-mastery. The percentage of the students achieving mastery increased by approximately 2.0 per cent compared with the previous year. There were no differences between the sexes in achieving mastery.

TABLE 22.3
PRIMARY LEVEL STUDENT ENROLMENT BY TYPE OF SCHOOL, 2010/11 -2012/13

	2010/11			2011/12			2012/13		
	Male	**Female**	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**
Primary (Grade 1-6)	97 130	94 427	**191 557**	99 080	96 134	**195 214**	97 206	92 980	**190 186**
All Age (Grades 1-6)	17 443	15 658	**33 101**	13 366	12 233	**25 599**	13 006	11 670	**24 676**
Prim & Junior High (Grades 1-6)	17 736	16 188	**33 924**	17 045	15 382	**32 427**	16 439	14 804	**31 243**
Sub Total	132 309	126 273	**258 582**	129 491	123 749	**253 240**	126 651	119 454	**246 105**
Preparatory [a]	15 877	15 153	**31 030**	15 538	14 849	**30 388**	12 032	11 348	**23 380**
Total	**148 186**	**141 426**	**289 612**	**145 029**	**138 598**	**283 628**	**138 683**	**130 802**	**269 485**

a - Estimated, ***Jamaica Survey of Living Conditions 2008-2010***

Source: Statistics Section, Ministry of Education

15 74.0 per cent in 2012

TABLE 22.4
TEACHERS EMPLOYED IN PUBLIC SECTOR SCHOOLS BY TYPE OF SCHOOL AND QUALIFICATION, 2011/12 - 2012/13

SCHOOL TYPE	2011/12						2012/13					
	TRAINED		PRE-TRAINED				TRAINED		PRE-TRAINED			
	Trained Graduate	Trained Teacher / Instructor	Pre-Trained Graduate	Pre-Trained Tertiary Level Graduate	Un-Trained Teacher	TOTAL	Trained Graduate	Trained Teacher / Instructor	Pre-Trained Graduate	Pre-Trained Tertiary Level Graduate	Un-Trained Teacher	TOTAL
Infant School/Departments	196	191	6	0	7	**400**	393	354	12	4	25	**788**
SUBTOTAL	196	191	6	0	7	**400**	393	354	12	4	25	**788**
Grades 1-6												
Primary	4 094	3 840	152	102	328	**8 516**	4 373	3 250	155	91	271	**8 140**
All-Age	521	462	10	12	36	**1 041**	578	396	10	12	30	**1 026**
Primary and Junior High	711	599	21	6	41	**1 378**	809	492	19	5	31	**1 356**
SUBTOTAL	5 326	4 901	183	120	405	**10 935**	5 760	4 138	184	108	332	**10 522**
Grades 7-9												
All-Age	285	189	20	14	23	**531**	275	146	17	14	14	**466**
Primary and Junior High	683	477	45	37	31	**1 273**	684	392	43	29	28	**1 176**
Secondary High	4 965	3 837	1 104	391	511	**10 808**	5 339	3 512	1 086	362	444	**10 743**
Technical High	529	431	101	63	49	**1 173**	590	381	96	55	51	**1 173**
Vocational/Agricultural (Grades 12-13)	12	12	5	8	3	**40**	12	8	5	8	3	**36**
SUBTOTAL	6 474	4 946	1 275	513	617	**13 825**	6 900	4 439	1 247	468	540	**13 594**
TOTAL	**11 996**	.	**1 464**	**633**	**1 029**	**25 160**	**13 053**	**8 931**	**1 443**	**580**	**897**	**24 904**

Note: Trained Graduates - University Trained Teacher with Teaching Diploma; Trained Teacher/Instructor- College Trained Teacher/Instructor; Pre-trained Graduate - University Graduate without Teaching Diploma; Pre-Trained Tertiary Level Graduates -Tertiary Level without Teaching Diploma; Un-Trained Teacher- Teacher with secondary certification without Teaching Diploma.

Source - Ministry of Education

The improved performance can be attributed to increased resources and the implementation of a national literacy programme for Grades 1–3 and Grades 4–6 with targeted support by literacy specialists. These measures were in addition to the Competence Based Transition Policy which states that only students certified as literate at Grade 4 are eligible to sit the GSAT.

Grade Four Numeracy Test (GFNT) [16]

In June 2013, a total of 42 485 students sat the GFNT; 38 265 from public schools, 4 171 from private schools, and 49 from special schools. Approximately 58.0 per cent (54.0 per cent, 2012) of the 42 436 students from public and private schools achieved mastery; 30.0 per cent achieved almost mastery, and 12.0 per cent non-mastery. Of those achieving mastery, 56.0 per cent were females.

Of the 792 public schools, 788 entered 38 265 students, approximately 56.0 per cent attained mastery[17] (57.0 per cent female); some 31.0 per cent attained almost mastery and 13.0 per cent non-mastery. Some 212 private schools entered 4 171 students with 83.0 per cent gaining mastery, 15.5 per cent almost mastery and 1.5 per cent non-mastery. The percentage of students achieving mastery remains the same as the previous year with 52.0 per cent being females.

Grade Six Achievement Test

The GSAT facilitates the placement and continued development of students at the secondary level. A total of 43 571 students registered for the examination with 97.1 per cent sitting. The mean percentage scores were Mathematics, 61.0 (63.0 in 2012); Language Arts, 63.0 (60.0 in 2012); Social Studies, 62.0 (62.0 in 2012); Science, 63.0 (64.0 in 2012); and Communication Tasks, 75.0 (75.0 in 2012). Girls outperformed boys in all five subject areas. Students in Kindergarten/Preparatory and Preparatory/Secondary schools had better results than their counterparts in the public school types (Figure 22C).

A review of the GSAT profile was conducted and a draft approved. A new test, the Primary Exit Achievement Profile (PEAP) is being developed.

Alternative Secondary Transition Education Programme (ASTEP)

Students who fail the GFLT[18], are placed in a special Programme, ASTEP. The programme lasts for two years, where they benefit from a special literacy-based curriculum; they are then transferred into the secondary system in year three. In 2013, a total of 5 224 students (79.0 per cent males) were enrolled in the programme. Approximately 1 866 students (79.2 per cent male) were accommodated in primary schools, 1

16 The Numeracy Test was introduced in 2009 at the Grade Four Level following a pilot to complement the Grade Four Literacy Test.

17 51.0 per cent in 2012

18 The National Competence Based Transition Policy

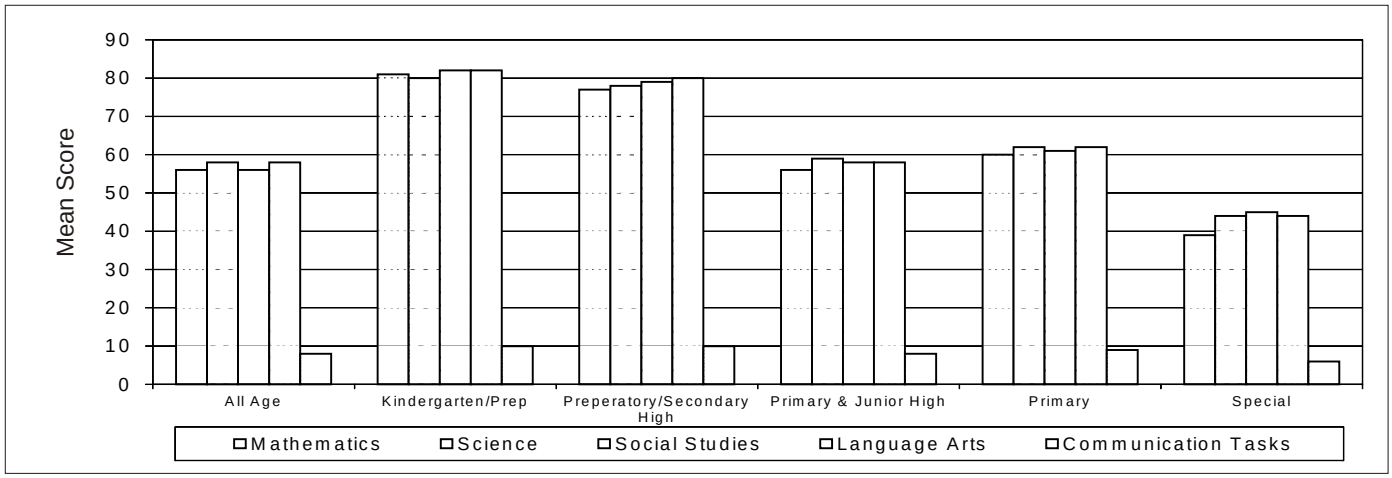

FIGURE 22C: PERFORMANCE IN GRADE SIX ACHIEVEMENT TEST BY SUBJECT AND SCHOOL TYPE, 2012/2013

453 (78.4 per cent male) in All Age Schools, and 1 905 (77.4 per cent male) in Primary and Junior High schools.

Secondary Education[19]

The total number of students enrolled in secondary institutions was 239 960, a 4.7 per cent decline compared with 2011/12 (Table 22.5). Of this number, an estimated 8 115 students were enrolled in private secondary schools. According to the MOE, the overall gross enrolment rate for Grades 7–11 was 91.9 per cent (89.0 per cent males and 94.9 per cent females). The Net Enrolment Rate was, however, 72.8 per cent[20] (77.8 per cent females and 67.9 per cent males). Females accounted for 51.2 per cent of total student enrolment (Figure 22D). The MOE data estimated that the average daily attendance at the secondary level during 2012/13 was 83.0 per cent, (girls 85.2 per cent and boys 81.0 per cent).

There were 13 594 teachers employed in the 361 public schools offering secondary level education, compared with the 13 825 recorded in 2011/12 (see Table 22.4). Among these teachers, 88.0 per cent were trained— 52.0 per cent were trained university graduates, while 36 per cent were college trained teachers/instructors (Figure 22E). The percentage of trained university graduates moved from 37.6 per cent in 2009. The average pupil to teacher ratio was 20:1[21] females accounted for 70.4 per cent of the total number of teachers employed at this level of the education system.

Academic Achievement

Terminal Examinations administered at the secondary level include the Caribbean Secondary Education Certificate (CSEC) and the Caribbean Advanced Proficiency Examination (CAPE).

CSEC Examinations

A total of 36 047 public school students were registered at the Grade 11 (56.6 per cent female) to sit the CSEC Examinations. Of the total registered, 35 278 sat the examinations[22]. Although Mathematics and English Language

TABLE 22.5
SECONDARY LEVEL STUDENT ENROLMENT BY SCHOOL TYPE, 2010/11-2012/13

	2010/11			2011/12			2012/13		
	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**
All Age (Grades 7-11)	4 546	1 687	**6 233**	3 117	1 215	**4 332**	2 065	900	**2 965**
Junior High/Prim. & Junior High (GRADE 7 -11)	11 180	6 120	**17 300**	8 057	4 889	**12 946**	6 654	4 255	**10 909**
Secondary High	95 613	106 671	**202 284**	93 856	105 129	**198 985**	93 995	102 705	**196 700**
Technical High	10 084	10 704	**20 788**	10 263	10 604	**20 867**	10 238	10 716	**20 954**
Vocational /Agricultural High	222	138	**360**	207	152	**359**	182	135	**317**
Sub Total	121 645	125 320	**246 965**	115 500	121 989	**237 489**	113 134	118 711	**231 845**
Private Secondary High [a]	6 355	7 051	**13 406**	6 930	7 319	**14 249**	3 960	4 155	**8 115**
TOTAL	**128 000**	**132 371**	**260 371**	**122 430**	**129 308**	**251 738**	**117 094**	**122 866**	**239 960**

a - Estimated ***Jamaica Survey of Living Conditions 2010*** **and** ***2012***

Source: Statistics Section, Ministry of Education

19 Secondary education is offered in All-Age and Primary & Junior High schools (Grades 7–9); Secondary, Technical High and Vocational High Schools, and Preparatory & Secondary Schools (Grades 7–11).

20 Net Enrolment in 2012, 74.2 per cent (80.6 per cent, female, 68.2 per cent, male)

21 Teachers on leave and administrators were excluded for the computation.

22 This represent 85.0 per cent of the 2012/13 Grade 11 cohort (42 200 students)

TABLE 22.6
PERFORMANCE OF PUBLIC SECONDARY SCHOOL STUDENTS AT THE GENERAL AND TECHNICAL PROFICIENCY LEVELS, CARIBBEAN EXAMINATION COUNCIL , 2010-2013

SUBJECTS	Number of Persons Sitting				(Percentage) [a]			
	2010	2011	2012	2013	2010	2011	2012	2013
Arts/Language								
English A (English Language)	24 324	24 592	27 626	26 489	70.8	68.5	52.0	63.7
Social Studies	14 420	15 304	16 774	16 487	77.6	69.9	70.2	68.5
Caribbean History	5 358	5 124	5 688	5 357	67.8	77.3	73.9	75.2
English B (English Literature)	7 084	7 018	7 075	7 430	82.0	78.6	74.2	80.1
French	653	691	723	822	68.6	77.4	81.6	83.2
Spanish	3 848	3 663	3 896	3 839	66.3	74.2	72.3	76.1
Religious Education	3 136	2 990	3 223	2 820	86.8	84.9	82.0	75.6
Geography	3 907	4 112	4 377	4 298	68.7	67.7	67.1	72.1
Music	135	149	139	156	43.7	57.0	53.2	62.2
Sciences								
Additional Mathematics	n/a	n/a	306	572	n/a	n/a	45.1	66.6
Biology	5 080	5 327	5 598	5 510	76.4	78.4	75.4	77.1
Human & Social Biology	8 427	9 041	10 126	9 866	68.2	65.2	59.8	67.1
Chemistry	4 633	5 031	5 073	5 198	70.5	66.0	63.3	66.7
Physics	4 403	4 340	4 589	4 714	72.8	73.9	76.5	68.7
Integrated Science	6 842	6 766	7 344	6 992	78.1	69.5	72.6	74.1
Mathematics	20 742	20 850	23 729	22 870	44.7	39.9	37.5	42.2
Technical/Vocational								
Agricultural Science (Animal Science)	2 412	2 472	2 795	2 864	89.5	90.9	90.9	93.3
Agricultural Science (Double Award)	435	420	551	452	91.3	94.0	92.7	95.4
Visual Arts	2 077	1 700	2090	1 905	67.9	65.8	66.5	76.9
Building Technology (Construction)	665	782	776	819	82.9	81.6	73.2	84.7
Building Technology (Woods)	887	928	1 116	978	74.3	68.0	57.1	78.6
Clothing & Textiles	1 320	1 354	1 428	1 625	82.0	79.1	85.9	73.2
Electrical & Electronic Technology	2 001	1 982	2 124	2 007	58.0	43.6	62.3	60.5
Elec Doc.Prep. & Mgmt.	4 099	4 355	4 646	4 539	89.3	82.7	88.5	84.0
Food & Nutrition	4 880	4 883	5 063	5 121	92.1	92.6	89.4	91.7
Home Management	3 521	3 516	3 759	3 769	84.7	88.8	84.0	84.6
Information Technology	9 279	10 515	11 204	11 160	81.4	75.1	80.5	79.2
Mech. Eng. Technology	1 109	1 078	1 229	1 347	60.5	54.1	65.1	73.9
Phys. Education & Sports	2 012	2 442	1 229	3 254	96.7	94.8	96.7	95.6
Technical Drawing	3 158	3 221	3 379	3 433	71.5	68.7	60.7	76.6
Theatre Arts	499	485	599	660	75.8	72.4	85.8	85.5
Business								
Office Procedures	4 908	4 556	4 686	4 226	81.2	88.8	80.3	84.2
Principles of Accounts	6 957	6 682	6 693	6 141	67.9	73.2	60.3	80.5
Principles of Business	8 471	8 312	8 864	8 458	84.3	84.9	87.1	85.8
Economics	630	722	914	902	68.9	78.8	67.6	89.7

a - expressed as a percentage of those sitting
n/a - not available

Source: Ministry of Eduction- Policy Analysis, Research and Statistics Unit

were compulsory for all students and were paid[23] for by the Government, the data showed that only 62.8 per cent of students enrolled in the Grade 11 cohort sat English Language, while 54.2 per cent sat Mathematics. In 2013, while there were improvements in the performance of candidates in these two subjects, it was still below the MOE performance targets[24]. The average percentage of students passing English Language improved to 63.7 per cent from 52.0 per cent in 2012, and for Mathematics, 42.2 from 37.5 per cent in 2012 (Table 22.6).

23 Government provides for examination fees for students with an average term grade of 50.0 per cent for both subjects

24 MOE Performance Target: 60 per cent of students sitting CSEC, attaining passes in five subjects including Math and English by 2020.

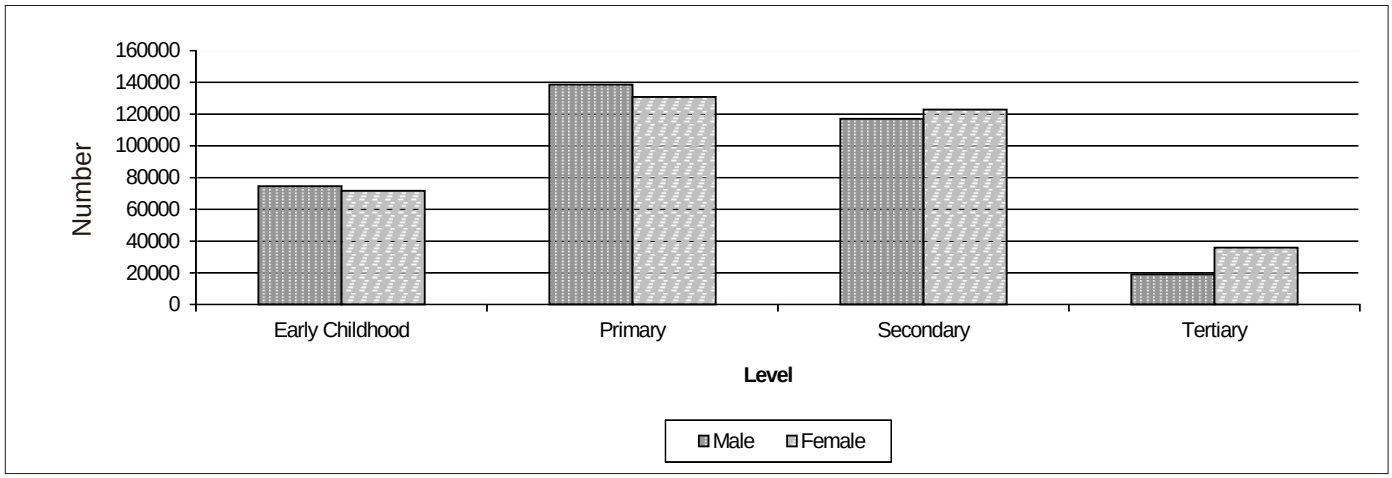

FIGURE 22D: ENROLMENT BY GENDER IN EARLY CHILDHOOD, PRIMARY, SECONDARY AND TERTIARY LEVEL SCHOOLS, 2013

Student Performance: Of the 193 360 subject entries (60.0 per cent females) in the CSEC examinations, 70.9 per cent attained Grades I–III compared with 66.7 per cent in 2012. The data on performance by sex continued to show females receiving higher quality grades than their male counterparts.

In the four business-related subjects there was an average 84.0 per cent pass rate. Economics had the highest pass rate, 89.7 per cent, followed by Principles of Business 85.8 per cent, and Office Procedures 84.2 per cent.

The Technical and Vocational subjects (82.6 per cent average) recorded the highest proportion of passes in Agricultural Science, Physical Education & Sports, and Food & Nutrition. These four subjects had pass rates greater than 90.0 per cent. Electrical and Electronic Technology recorded the lowest proportion of passes, (60.5 per cent) in this area (see Table 22.6).

The average pass rate for the Arts and Language subject group was 72.0 per cent (64.2 per cent, 2012). The subjects with the highest performance in this group were French (83.2 per cent) and English B (80.1 per cent) (see Table 22.6). The average pass rate for Sciences was 58.9 per cent, compared with 55.2 per cent in 2012. Biology, recorded the highest proportion of passes, 77.1 per cent (75.4 in 2012), followed by Integrated Science 74.1 per cent (72.6 in 2012). Mathematics was the lowest with 42.2 per cent, a 4.7 percentage points improvement compared with 2012.

Performance by School Type in Mathematics and English Language

Data provided by the MOE indicated an improvement in the performance of students in these two subjects across all schools compared with the 2011/12 academic year. Secondary High

TABLE 22.7
JAMAICAN STUDENT PERFORMANCE IN THE CARIBBEAN EXAMINATION COUNCIL, GENERAL PROFICIENCY CSEC EXAMINATIONS, ENGLISH LANGUAGE AND MATHEMATICS, BY SCHOOL TYPE, 2009-2013

	Mathematics					English				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
Secondary High Schools										
Eligible Cohort	36 468	37 357	37 958	39 038	37 852	34 648	37 357	37 958	39 038	37 852
Entries	18 212	19 148	19 520	22 165	21 158	20 816	22 071	55 535	25 296	24 126
Sitting exam	17 756	18 510	19 039	21 580	20 712	20 348	21 647	22 126	24 817	23 785
Awards	7 618	8 631	7 885	8 383	9 111	13 264	15 774	15 529	13 344	15 464
Per cent of Sitting Awarded	42.9	46.6	41.4	38. 8	44.0	65.2	72.9	70.2	53.8	65.0
Technical/Agricultural Schools										
Eligible Cohort	4 780	4 875	4 721	4 459	4 348	4 780	4 875	4 721	4 459	4 348
Entries	2 345	2 331	1 853	2 233	2 196	2 956	2 744	2 505	2 872	2 742
Sitting exam	2 234	2 232	1 811	2 149	2 158	2 866	2 677	2 466	2 809	2 704
Awards	567	640	433	507	548	1 324	1 440	1 322	1 022	1 406
Per cent of Sitting Awarded	25.4	28.7	23.9	23.6	25.4	46.2	53.8	53.6	36.4	52.0
All Schools										
Eligible Cohort	41 248	42 232	42 679	43 497	42 200	41 248	42 232	42 679	43 497	42 200
Entries	20 557	21 479	21 373	24 398	23 354	23 772	24 815	25 040	28 168	26 868
Sitting exam	19 990	20 742	20 850	23 729	22 870	23 214	24 324	24 592	27 626	26 489
Awards	8 185	9 271	8 318	8 890	9 659	14 588	17 214	16 851	14 366	16 870
Per cent of Sitting Awarded	40.9	44.7	39.9	37.5	42.2	62.8	70.8	68.5	52.0	63.7

Source: Policy Analysis, Research and Statistics Unit, Ministry of Education

Schools, however, performed better than their counterparts in Technical/Agricultural High Schools. Students in the former school type had scores of 65.0 per cent for English A and 44.0 per cent for Mathematics, compared with students in Technical/Agricultural High Schools who scored 52.0 per cent and 25.4 per cent, respectively (Table 22.7).

A ***National School Leaving Certificate*** was developed to provide a standardized record of competence at the end of secondary education. In 2013, the concept/design was developed and approved and the documents are being finalised.

Under the Infrastructural Development Programme, school places were increased at the primary and secondary levels in order to reduce overcrowding and eliminate the shift system. This yielded 4 170 places at 15 schools (two at the primary level and 13 at the secondary level).

Qualification for Tertiary Level Institutions

The basic requirement for entry to tertiary institutions is five CSEC subjects including English Language and/or Mathematics. Students gaining five or more subjects inclusive of English Language and Mathematics numbered 7 181 (6 383 in 2012). The total achieving five or more subjects including English Language but not Mathematics was 3 662, and there were 408 with Mathematics but not English Language. Of the 35 278 public secondary school candidates who sat the CSEC in June 2013, approximately 11 251 or 31.9 per cent obtained five or more subjects[25]. Based on these outcomes approximately 26.7 per cent of the Grade 11 cohort could qualify for tertiary level entry, depending on the requirements of specific institutions.

Caribbean Advanced Proficiency Examinations (CAPE)

CAPE is also one of the required standards for matriculation to tertiary institutions. The terminal examination for students in Grades 12 and 13 and at Community Colleges, it is offered in 24 subjects (46 modules) at two levels (Units I and II). In June 2013, a total of 53 185 entries were received, 37 173 and 16 012 for Units 1 and 2, respectively. Approximately 90.0 per cent of the students' gained the passing grade (Grades I-V) compared with 87.2 per cent in 2011/2012.

There were 42 335 subject entries for both Units from public secondary schools, which accounted for 79.6 per cent. Approximately 29.0 per cent sat only one subject, while 31.0 per cent sat four subjects. On the average, 90.8 per cent and 82.7 per cent of the Unit I entries from High Schools and Community Colleges, respectively, received passing grades. The average pass rate for Unit 2 entries was 92.1 per cent for High Schools and 89.6 per cent for Community Colleges.[26]

The best performances by all Jamaican candidates in Unit I were in Art and Design (100.0 per cent) Food and Nutrition (98.3 per cent); and Communication Studies (96.7 per cent). The lowest performances at this level were in Pure Mathematics (65.7 per cent); History (75.8 per cent); and Electrical and Electronic Technology (77.2 per cent). In Unit II, the best performances were in Art and Design (100.0 per cent), Food and Nutrition (100.0 per cent) and French (95.7 per cent). The lowest performances were in Geometrical and Mechanical Engineering Drawing (76.3 per cent), and Electrical and Electronic Technology (76.3 per cent).

Special Education

The Special Education curriculum was provided to a population of 3 748 students in two types of programmes (Table 22.8): formal school-based programmes and home/community-based programmes:

Formal School –Based Programmes are those for which the MoE has full responsibility for supervision and for their annual recurrent expenditure. The schools and units included are:

- The School for the Blind and Visually Impaired (1)
- Schools for the Hearing Impaired (three in addition to four satellites)
- Schools for the Intellectual Disabled/Mentally Retarded (six in addition to 23 satellites)
- Government Special Education Units attached to primary schools (10).

Non-Government Organizations/Community-Based Programmes

These organizations receive salary support of $33.9 million from the MoE. Educational, rehabilitation and therapeutic services for children with disabilities are provided by 18 organizations serving 2 176 children.

Due to inadequate space in the public education system for students with special needs, the Ministry placed 43 additional students in selected private special education facilities during the period under review. A total of 162 students are now in private placement. Some 322 students were assessed in literacy and numeracy, with 5.0 per cent making three or more grade level movements; 8.0 per cent made two grade level movements; 21.0 per cent made one grade level movement, and 50.0 per cent moved within grade level.[27]

A total of 277 teachers were trained in using differentiated instruction in regular and special education settings. Some 95 teachers' assistants, employed in six special schools were trained in Task Analysis and Understanding the Child with Special Needs. Some 354 teachers were sensitized in a one-day training workshop on, Understanding the Male Learner and the Integration of Evidence-Based Teaching Strategies to create Boy-Friendly Classrooms. Another 138 teachers in seven special schools were sensitized on School to Work Transitioning. Students were placed in 22 resource room programmes for focus on literacy and numeracy deficits.

System Enhancement/Special Highlights

Students at the Salvation Army School for the Blind & Visually Impaired and those students who are integrated in general education programmes, continued to perform satisfactory at academic and vocational programmes. Students at these institutions gained passes in the following subjects: Principle of Business, Office Administration, Home Economics and Management and Social Studies. Students who sat CAPE Level I and Level II subjects were also successful in Sociology, Communication Studies, Management of Business, and Accounts.

25 The comparable data for 2008 showed that 9 592 or 30.4 per cent of candidates met the basic requirements for tertiary education.

26 The overall pass rate (Grade I –III) for Unit 1 is 52.4 percent while the similar pass rate for Unit 2 is 56.9 per cent

27 Some 14.4 per cent had no baseline data

The ESTP has in place a Special Needs Project Coordinator to plan the strategic development of special education in Jamaica. The project engaged the services of eight Regional Special Needs Coordinators, to provide technical support and advice to school administrators and teachers in mainstream primary schools, to address the needs of children suspected of, or diagnosed as having a special education need. This intervention will address advancement of special education programmes and services in mainstream settings.

The Project is currently involved in a Child Find initiative to identify students with special needs. It is anticipated that approximately 75 000 will be assessed by the end of 2014. The ESTP also provided professional development opportunities for trainer of trainers to address a variety of behaviour challenges. Trainer of Trainers workshops conducted were (a) Team Teach (a positive behavior management system); and (b) Autism Pro (a specialized behaviour management programme for students with autism). In order to provide needed classroom assistance for teachers and students in special education classrooms, a total of 26 persons were trained as teachers' aides, under a Career Advancement Programme (CAP) initiative. This was done in collaboration with the HEART Trust/NTA. Some 19 aides were deployed to special education facilities.

SECTION 4: POST SECONDARY

This section reviews the activities of post-secondary education and training institutions and the contribution that these institutions made to providing skilled and semi-skilled workers and technicians. Available data indicated that some 65 646 persons (61.0 per cent female) were trained in post-secondary institutions compared with 50 303 in 2012 (Table 22.9).

HEART Trust/ National Training Agency

The HEART Trust/NTA continued its effort to provide leadership and innovation in the delivery of Technical and Vocational Education and Training, in support of the transformation of the Jamaican economy.

Enrolment and Graduation

A total of 76 064 persons accessed training sessions at the HEART Trust/NTA, a 3.1 per cent decline compared with 2011/2012 (Table 22.10). Included in the total was 8 864 students enrolled in the Career Advancement Programme (CAP). In HEART's mainstream areas, females accounted for 56.6 per cent of enrolment. Enrolment declined in four sector areas with the Creative Industries recording the highest (down by 40.8 per cent) followed by Agricultural Skills (down 13.5 per cent). The areas that increased were Manufacturing (up by 13.7 per cent), and Services (up by 1.6 per cent). Data on enrolment by training levels revealed that 37.7 per cent of total enrolment was in Level I; 31.6 per cent in Level II; 6.6 per cent in Level III; 0.7 per cent at Level IV and above; and 5.5 per. cent at the Tertiary level. The remaining 17.9 per cent were enrolled in Unit Competencies programmes, joint and other Non-NCTVET programmes.

The total number of HEART graduates increased by 7.1 per cent to 42 129 (58.7 per cent females). There was an increase in the number of persons who graduated across all skill areas with the exception of Creative Industries (down by 49.3), Agricultural Skills (down by 24.9 per cent) and ICT (down by 6.4 per cent).

Data on completion of training levels revealed that 35.2 per cent of those completing were in Level I; 30.1 per cent in Level II; 6.6 per cent in Level III; 0.5 per cent at Level IV and above; and 5.3 per. cent at the tertiary level. The remaining 22.3 per cent (9 412 trainees), completed Unit Competencies programmes and Non-NCTVET programmes.

The ***Workforce Solutions Programme (formerly the Enterprise-Based Training [EBT] Programme*)** supported businesses by assisting them in defining training needs and providing training. The total number of persons enrolled in these programmes was 20 335 (63.5 per cent female), while those graduating was 11 331 (65.3 per cent female). Enrolment in **Institution-Based Training**[28] was 27 618 (51.3 per cent female), while total output from these training programmes was 15 739 (52.5 per cent female).

TABLE 22.8
ENROLMENT IN GOVERNMENT AND NON-GOVERNMENT SPECIAL EDUCATION PROGRAMMES, 2012/13

AREA OF FOCUS	Male	Female	Total
Intellectually Challenged	1 025	548	**1 573**
Blind and Visually Impaired	92	45	**137**
Deaf and Hearing Impaired	182	138	**320**
Learning Disabled	205	81	**286**
Multiple Disabled	230	164	**394**
Physically Disabled	89	75	**164**
Autistic	188	41	**229**
Attention Deficit Hyperactivity Disorder (ADHD)	69	20	**89**
Speech and Language Disabled	193	108	**301**
Others	223	32	**255**
Total	**2 496**	**1 252**	**3 748**

Source: Special Education Unit, MOE

28 These include HEART Colleges (Academies),TVET Institutes (Vocational Training Centres)and Learning Resource Centres

Community Training Interventions (formerly Community-Based and other Special Programmes) are aimed at satisfying the demand for training identified by the communities. These programmes are operated by non-governmental organizations, community-based organizations and faith-based institutions. Overall, enrolment was 10 786 (68.3 per cent female), while output from these programmes was 6 573 (68.2 per cent female).

NVQ-J & Other Certifications

Total NVQ-J and Tertiary (HEART College of Innovation and Technology[29] and VTDI) certifications awarded for the fiscal year was 19 019, representing an 11.1 per cent decline. A total of 17 260 individuals received NVQ-J certification (Level 1-5), while 1 831 individuals were certified in HEART Trust/NTA's tertiary programmes. A total of 3 509 Joint & Other certifications were issued while, an additional 3 866 Unit certifications were awarded.

Development

During fiscal year 2012/13, a decision was taken to suspend the implementation of additional Workforce Colleges until the required structures/facilities to support these institutions were established. Consequently, the two targeted institutions focused on the development and implementation of the required structures/facilities, as well as on the implementation of higher level programmes to enhance the quality and relevance of programmes delivered system-wide.

Additionally, emphases were placed on a number of areas including:

- The documentation of Systems and Procedures
- Strengthening Human Resources
- Improvement/upgrading of the physical infrastructure.

Six higher level programmes were approved for implementation at the HEART College of Innovation and Technology.

The Revised Assessment Process was implemented to support the TVET System. Some 24 Accredited Training Organizations with 143 programmes commenced training, utilizing the revised methodology. The implementation of the revised assessment process is supported by the development and maintenance of a 'quality driven' training system.

The Jamaica Emergency Employment Programme (JEEP)

The HEART Trust/NTA participated in the JEEP, to provide training and certification opportunities to Jamaican nationals to facilitate their engagement in gainful employment. The activities conducted under JEEP included:

- an orientation programme providing exposure to work ethics, occupational health and safety and awareness of the attitudes required for the 'world of work'
- training in technical knowledge and skills
- recognition of competence in units acquired on the job by individuals functioning at the requisite literacy and numeracy levels
- certification for those individuals who possess the requisite literacy and numeracy skills, experiences, knowledge and technical skills.

TABLE 22.9
OUTPUT OF SKILLED AND SEMI-SKILLED MANPOWER BY OCCUPATION, 2010-2013

OCCUPATION	2010			2011			2012			2013		
	Male	Female	**TOTAL**	Male	Female	**TOTAL**	Male	Female	**Total**	Male	Female	**Total**
1. Agricultural Personnel	1 709	412	**2 121**	926	376	**1 302**	1 973	1 317	**3 290**	1 370	2 245	**3 615**
2. Cooks, Waiters & Other Hotel Personnel	3 494	9 734	**13 228**	2 446	8 100	**10 546**	2 375	6 172	**8 547**	3 383	13 091	**16 474**
3. Craftsmen, Production Process and Operating Personnel	7 677	1 084	**8 761**	7 728	1 199	**8 927**	7 034	1 499	**8 533**	7 296	2 675	**9 971**
4. Police	853	311	**862**	506	267	**773**	523	50	**573**	636	117	**753**
5. Secretarial and Other Commercial Personnel	2 249	5 555	**7 804**	2 624	5 991	**8 615**	2 854	5 655	**8 509**	5192	8 720	**139 12**
6. Cosmetology	38	2 566	**2 604**	77	2 393	**2 470**	80	2 299	**2 379**	150	1 091	**1 241**
7. Computing	3 138	5 761	**8 899**	3 216	4 788	**8 004**	5 596	7 386	**12 982**	5 971	7 796	**13 767**
8. Miscellaneous [a]	813	3 005	**3 818**	1 941	5 972	**7 913**	2 037	3 453	**5 490**	1 296	4 617	**5 913**
TOTAL	19 751	28 346	**48 097**	19 464	29 086	**48 550**	22 472	27 831	**50 303**	25 294	40 352	**65 646**

a - Miscellanous occupations - Includes training in Early Childhood Care, Practical Nursing, Health Services, Assessors Training and other customized programmes

Source: Compiled from data supplied by Police Academy, Human Employment and Resource Training Trust/National Training Agency (HEART Trust/NTA), Technical High, Vocationa/Agricultural Schools and Other Selected Training Institutions.

29 Formerly Caribbean Institute of Technology

TABLE 22.10
ENROLMENT AND OUTPUT OF SKILLED AND SEMI-SKILLED MANPOWER FROM NON-FORMAL HUMAN DEVELOPMENT AND RESOURCE TRAINING/ NATIONAL TRAINING AGENCY PROGRAMMES, 2011/12 -2012/13

SKILL AREAS	ENROLMENT 2011-2012			OUTPUT 2011-2012			ENROLMENT 2012-2013			OUTPUT 2012-2013		
	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**
Agricultural Skills	708	484	**1 192**	387	260	**647**	551	480	**1 031**	253	233	**486**
Construction	10 980	735	**11 715**	5 081	400	**5 481**	10 423	767	**11 190**	5 244	505	**5 749**
Creative Industries	320	351	**671**	226	314	**540**	185	212	**397**	101	173	**274**
ICT	4 567	4 359	**8 952**	2 410	2 824	**5 260**	4 252	4 321	**8 573**	2 518	2 406	**4 924**
Manufacturing	832	832	**1 664**	458	569	**1 027**	841	1 051	**1 892**	513	783	**1 296**
Services	10 706	12 773	**23 479**	5 218	6 519	**11 737**	8 766	15 092	**23 858**	5 192	8 720	**13 912**
Tourism	5 246	12 423	**17 669**	2 441	6 562	**9 003**	4 723	13 339	**18 062**	2 278	7 297	**9 575**
Other(Non-Vision 2030 Sectors)	4 566	8 569	**13 135**	1 499	4 157	**5 656**	3 287	7 774	**11 061**	1 296	4 617	**5 913**
Grand Total	37 925	40 526	**78 477**	17 720	21 605	**39 351**	1 577	43 036	**76 064**	17 395	24 734	**42 129**

Source: Technical Services Divison, HEART Trust/ NTA (2013)

Other Training Initiatives

HEART Trust/NTA was engaged to provide training on behalf of the Ministry of Labour and Social Security (MLSS), the MoE and the Youth Upliftment through Employment (YUTE) Programme. A total of 404 individuals were trained and assessed under the initiative.

On-the-Job Assessment was conducted for entities/agencies including the MLSS, Hampden Housing Project and Bodles Research Station. Approximately 200 individuals were accommodated through this initiative.

Accredited Training Organizations (ATOs) and Approved Centres

One new Accredited Training Organization (ATO), St. Elizabeth Technical High School, was established during the period under review and will serve to expand access to training and certification of the workforce. Some 11 new Approved Centres were also established. To date a total of 142 ATOs and Approved Centers were in operation.

Support Services for the Career Advancement Programme (CAP).

A total of 75 senior schools with an enrolment of 14 732, were supported under the Career Advancement Programme. Other areas of support provided included:

- City and Guild Literacy and Numeracy Training Workshop facilitated to strengthen the quality of the programme delivery
- Training for CAP Librarians
- Initiatives for Jamaica Foundation for Lifelong Learning Achievement Assessment to be administered to students in CAP institutions.

***Qualifications Developed*:** A total of 52 new qualifications were developed. Of the new qualifications developed, 12 were at Levels 4 & 5. Additionally, 46 qualifications were revised.

Distance Education: A number of institutions increased their utilization of Distance Education in the delivery of training and a number of higher level training programmes were offered including Industrial Maintenance Electrical – Level 3; Business Management – Level 3 and Administrative Assistant – Level 3.

A number of strategic partnerships aimed at expanding opportunities for training and certification of the workforce, were developed/maintained. These partnerships included:

- training in Sustainable Tourism in the Maritime sector with the Caribbean Maritime Institute
- the development and expansion of Portmore Academy with support from SENAI, Brazil
- the offering of Associates Degrees and Degree programmes (Entertainment and Events Management; Bachelor of Education in Applied Technology; in conjunction with the Council of Community Colleges of Jamaica
- training and assessment of Officers in the Jamaica Constabulary Force.

SECTION 5: TERTIARY EDUCATION AND TRAINING

This section reviews the activities of both public and private tertiary institutions and their contribution to developing the skills and intellectual capacity of professionals, senior officials and technicians for the local, regional and global labour force. Available data indicate that the output of tertiary institutions totalled 16 595 (69.3 per cent female) {Table 22.11}. Enrolment at this level was estimated at 74 413 students (68.7 per cent female), a gross enrolment rate of 28.9 per cent of the tertiary age cohort (20–24 years) {Table 22.12}.

Community Colleges

Community Colleges[30] provide pre-university and general education programmes, as well as professional and para-professional training opportunities.There are five

30 These include Moneague and Brown's Town in St. Ann; Bethlehem in St. Elizabeth; Montego Bay in St. James; Portmore in St. Catherine; Knox in Manchester; Excelsior Community College (EXED) in Kingston and at the College of Agriculture, Science and

BOX 22.3: Enrolment and Output for Community Colleges/Multidisciplinary Colleges

Name of Institution	Enrolment	Output	New Programmes
Brown?s Town Community College	1 162 (67.6 per cent female)	108 (83.3 per cent female)	
Knox Community College	1 090 (61.1 per cent female)	311 student	
Montego Bay Community College	1 450 (68.8 per cent female)	549 (71.8 per cent female)	BSc in Animal Science BSc in Plant Science Postgraduate Diploma in Education BSc in Agricultural Education ASc in Environmental Science
Excelsior Community College (EXED	2 134 (69.9 per cent female)	556 (74.6 per cent female)	
Moneague College	1 449 students (73.8 per cent female)	346 (71.6 per cent female)	
Bethlehem Moravian College	815 (88.5 per cent female)	200 (90.5 per cent female)	Secondary History and Social Studies BEd with Advance Standing
Portmore Community College	872 students (62.5 per cent female)	172 students	

Community Colleges and three multi-disciplinary colleges offering various types and levels of education and training in 22 strategically locations islandwide. Each Community College offers tertiary programmes developed by the Council of Community Colleges of Jamaica (CCCJ) and other college programmes offered by the institutions or through partnerships with agencies. A total of 10 505 students (64.4 per cent female) were enrolled in the institutions, with 2 949 graduating (71.0 per cent female). A breakdown of enrolment and output by College is represented in Box 22.3 and Figure 22.E.

Teacher Training Institutions

Teacher education was provided by 11 public institutions[31], in conjunction with the education departments—UWI, UTech, International University of the Caribbean, Hydel University College and Northern Caribbean University (NCU), the Vocational Training Development Institute (HEART/Trust NTA), and the Catholic College of Mandeville. Available data show that some 9 798 (70.1 per cent female) students were enrolled in public and private sector teacher training institutions/departments. The number of graduates was 4 763 (77.0 per cent female) students (see Table 22.11). See Box 22.44 for enrolment and output for selected teacher training colleges/departments.

Nursing Education

Available data indicate that 2 039 students (53 males) were enrolled in all Nursing programmes in seven training institutions[32] and 729 (12 males) graduated {Table 22.13}.At the ***UWI School of Nursing, Mona***, 208 students (four males) were enrolled in the BScN for registered nurses with 172 (4 males) graduating.

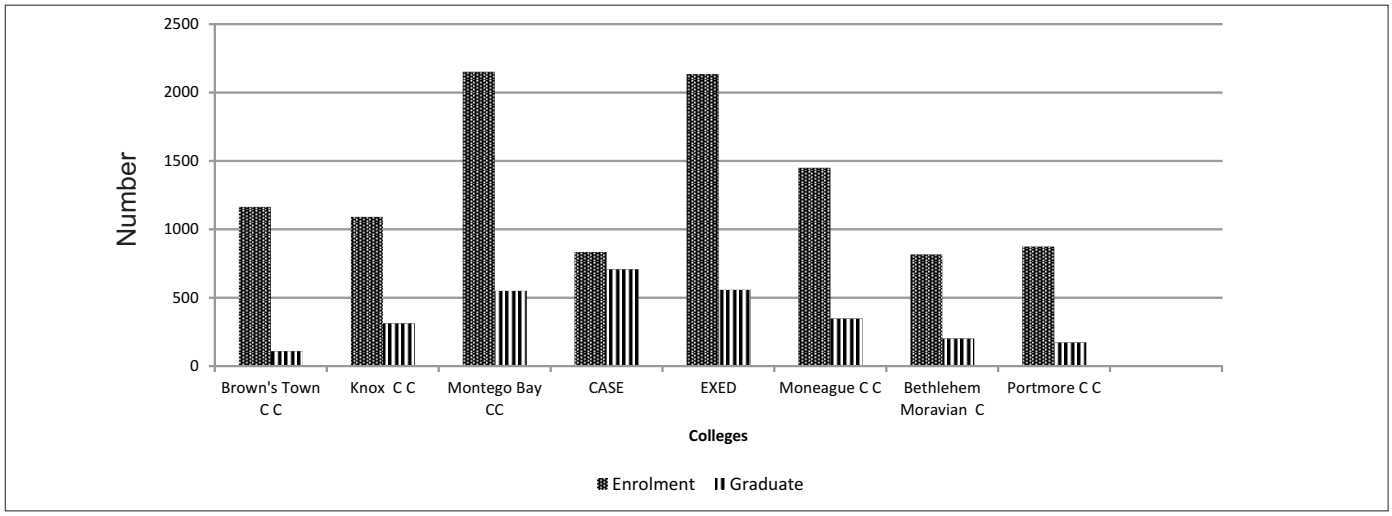

FIGURE 22E: ENROLMENT AND GRADUATION AT COMMUNITY COLLEGES, 2013

Education (CASE) in Portland. Moneague College, Bethlehem and CASE are multi-disciplinary institutions as they also serve as teacher training institutions.

31 The 11 public institutions are the; Knox Community College; Church Teachers' College; Edna Manley College of the Visual and Performing Arts; G.C. Foster College of Physical Education and Sport; Mico University College; Moneague College; Shortwood Teachers' College; College of Agriculture, Science and Education; Sam Sharpe Teachers' College and St. Joseph's Teachers' College.

32 Browns Town Community College, Northern Caribbean University, Caribbean School of Nursing (UTech), Excelsior School of Nursing, Knox Community College, Portmore Community College, Montego Bay Community College, and the University of the West Indies School of Nursing.

TABLE 22.11
OUTPUT OF PROFESSIONAL, SENIOR OFFICIALS AND TECHNICIANS, 2011- 2013

OCCUPATION	2011			2012			2013		
	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**
Teachers	552	2 655	**3 207**	653	2 399	**3 052**	569	2 667	**3 236**
Vocational Instructors	472	593	**1 065**	579	828	**1 407**	476	815	**1 291**
Others	68	385	**453**	34	122	**156**	30	206	**236**
Medical Doctors	51	136	**187**	62	166	**228**	89	196	**285**
Nurses	15	755	**770**	26	714	**740**	14	833	**847**
Diagnostic Radiographers (Prof. & Technicians)	5	14	**19**	5	17	**22**	15	12	**27**
Food & Nutrition (Prof. & Technicians)	2	29	**31**				11	56	**67**
Medical Technologists (Prof. & Technicians)	13	27	**40**	19	47	**66**	14	39	**53**
Laboratory Technicians	0	0	**0**	0	0				**0**
Pharmacists (Prof. & Technicians)	22	77	**99**	27	114	**141**	26	165	**191**
Physiotherapists	0	19	**19**	4	20	**24**	10	25	**35**
Dental Nurses/Assistants	1	12	**13**	1	28	**29**	8	58	**66**
Others	37	196	**233**	28	183	**211**	84	269	**353**
Accountants	308	837	**1 145**	487	1 278	**1 765**	51	142	**193**
Managers/ Administrators	941	2 881	**3 822**	923	2 402	**3 325**	978	3 573	**4 551**
Engineers	230	36	**266**	232	37	**269**	113	52	**165**
Engineering Technicians	13	2	**15**	12	5	**17**	64	6	**70**
Economists	26	24	**50**	30	39	**69**	33	47	**80**
Social Scientists	55	260	**315**	77	177	**254**	124	375	**499**
Others	306	636	**942**	188	511	**699**	100	505	**605**
Physicists	2	1	**3**	0	1	**1**	6	5	**11**
Chemists	31	49	**80**	22	39	**61**	32	36	**68**
Others	158	243	**401**	116	189	**305**	140	206	**346**
Architecture (Prof. & Technician)	46	18	**64**	18	23	**41**	19	17	**36**
Land Surveyors (Prof. & Technicians)	45	23	**68**	13	22	**35**	56	20	**76**
Planning and Construction (Prof. and Technicians)	34	23	**57**	50	96	**146**	116	43	**159**
Others	21	1	**22**	46	67	**113**	753	32	**785**
Attorneys	32	67	**99**	25	112	**137**	58	191	**249**
Law Professionals	0	0	**0**	49	116	**165**	4	10	**14**
Mathematicians	10	6	**16**	15	10	**25**	11	22	**33**
Agriculturalists	67	75	**142**	39	29	**68**	42	48	**90**
Computer Operator/Programmer	372	275	**647**	462	473	**935**	619	294	**913**
Computer Technician	44	5	**49**	13	6	**19**	133	37	**170**
Theologians	22	14	**36**	42	10	**52**	31	8	**39**
Engineers/Deck Officer	110	23	**133**	134	52	**186**	144	36	**180**
Miscellaneous Occupations	117	405	**522**	173	524	**697**	128	448	**576**
Total	4 228	10 802	**15 030**	4 604	10 856	**15 460**	5 101	11 494	**16 595**

Source: Compiled from data supplied by the University of the West Indies, University of Technology and other Tertiary Institutions.

Other Local Public Institutions

Management Institute for National Development (MIND)

The Institute had some 4 191 students (76.0 per cent female) enrolled and 3 437 graduating (77.0 per cent female). The graduands were from the following areas: Post Graduate Programmes (23.0 per cent); Associates of Science Degrees (27.0 per cent); Diplomas (39.0 per cent); and Partnership Certificates (11.0 per cent)

During the year, MIND strengthened and/or increased partnership and collaboration with other training and development institutions including University of Portsmouth – Institute of Criminal Justice, the Independent Commission of Investigations (INDECOM), the Physical Life (Inc.), and the Bureau of Women's Affairs.

MIND also established agreements with several Ministries, Departments and Agencies (MDAs), Cabinet Office and the Ministry of Finance and the Public Service, as well as, private local, regional and international institutions and organizations. This resulted in the joint development, delivery and evaluation of several critical training interventions, to build the requisite skills and competencies throughout the public and private sectors.

BOX 22.4: Enrolment and Output for Teachers' Colleges Department

Name of Institution	Enrolment	Output	New Programmes
Temple University/Church Teachers' College	42 students (28 females))		
Church Teachers' College	847 (83.1 per cent female)	209 (82.8 per cent female)	
G.C. Foster College of Physical Education & Sport	746 (52.8 per cent female)	199 (50.3 per cent male)	
Moneague College	578 students (89.4 per cent female)	142 (90.1 per cent female)	
Mico University College	820 (81.1 per cent female)	492 (82.1 per cent female)	
Edna Manley College of the Visual and Performing Arts	523 (50.3 per cent female)	92 students	
St. Joseph's Teachers' College	542 (96.8 per cent female)	153 sudents	BEd Advanced Standing Programme
Vocational Training Development Institute	2 622 (55.3 per cent female)	938 (66.3 per cent female).	
Shortwood Teachers' College	695 (90.5 per cent female)	212 (89.2 per cent female)	
Sam Sharpe Teachers' College	735 (92.4 per cent female)	209 (85.9 per cent female)	

In collaboration with the Jamaica Social Investment Fund (JSIF), MIND developed and delivered training to participants in 12 Community-Based Organisations, in the area of Organisational Strengthening and Institutional Capacity Building. Some 187 representatives of these Community-Based Organisations were trained.

The Priority Training Programme encompasses a series of training interventions in support of the implementation of the GOJ Medium Term Action Plan (MTAP). These programmes are designed to advance the GOJ's thrust towards improved standards of public service performance. The programme offerings included:

- Human Resource Management for the Public Service
- Introduction to Government of Jamaica Procurement Policies and Procedures

TABLE 22.12
ENROLMENT IN SELECTED TERTIARY INSTITUTIONS BY GENDER, 2012/13

Institution	Male	Female	Total
B & B University College	64	336	**400**
Brown's Town Community College	377	785	**1 162**
Bethlehem Moravian College	94	721	**815**
Heart College for innovation and Technology	675	327	**1 002**
Caribbean Maritime Institute	989	460	**1 449**
Catholic College of Mandeville	54	586	**640**
Church Teacher's College- Mandeville	157	732	**889**
College of Agriculture Science and Education	331	502	**833**
Cornwall Automotive Training Institute	25	0	**25**
Edna Manley College of the Visual and Performing Arts	260	263	**523**
Excelsior Community College	643	1 491	**2 134**
G. C. Foster College of Physical Education & Sport	352	394	**746**
Hydel University College	9	113	**122**
International University of the Caribbean	507	2 640	**3 147**
Institute of Chartered Accountants	312	471	**783**
Jamaica Theological Seminary	51	118	**169**
Knox Community College	429	661	**1 090**
Management Institute of National Development	1 009	3 182	**4 191**
Mico University College	155	584	**739**
Moneague Community College	267	1 182	**1 449**
Montego Bay Community College	452	998	**1 450**
Northern Caribbean University	1 274	3 886	**5 160**
Nova SouthEastern University[a]	1 100	3 404	**4 504**
Nursing Schools	53	1 986	**2 039**
Portmore Community College	773	1 130	**1 903**
Rockfort Vocational Training Centre	17	1	**18**
Sigma College of Nursing and Applied Sciences	3	81	**84**
Sam Sharpe Teacher's College	66	669	**735**
Shortwood Teacher's College	66	629	**695**
Stony Hill HEART Acadamy	509	100	**609**
St. Joseph's Teacher's College	17	525	**542**
University College of the Caribbean	1 008	2 675	**3 683**
University of Technology, Jamaica	5 366	7 668	**13 034**
The University of the West Indies	4 630	10 397	**15 027**
Vocational Training Development Institute	1 173	1 449	**2 622**
Total	**23 267**	**51 146**	**74 413**
2013 End of Year Population 20-24 Years (Tertiary Cohort)	130 007	127 257	**257 264**
	Male	**Female**	**Total**
Tertiary Gross Enrolment Rate	17.9	40.2	**28.9**

a - includes students enrolled in On-Line Programmes

Source: Tertiary Institutions and the MOE Statistics Unit

TABLE 22.13
ENROLMENT AND OUTPUT IN NURSING SCHOOLS AND DEPARTMENTS, 2012/13

Institutions	Enrolment			Output		
	Male	Female	**Total**	Male	Female	**Total**
Brown's Town Community College	2	127	**129**	0	40	**40**
Cornwall School of Nursing	0	41	**41**	0	42	**42**
Universtiy of Technology	13	551	**564**	1	141	**142**
Knox Community College	1	78	**79**	n/a	n/a	**n/a**
EXED Community College	19	242	**261**	7	84	**91**
Midwifery Schools	0	138	**138**	0	123	**123**
Portmore Community College	0	28	**28**	n/a	n/a	**n/a**
The University of the West Indies	4	208	**212**	4	168	**172**
Sigma Schools of Nursing	0	0	**0**	0	0	**0**
International University of the Caribbean	0	0	**0**	0	0	**0**
Northern Caribbean University	14	573	**587**	0	119	**119**
GRAND TOTAL	**53**	**1 986**	**2 039**	**12**	**717**	**729**

Source: Nursing Schools

- Professional Certificate in Industrial Relations
- Management Analysis
- Customer Service Monitoring and Evaluation System
- Coaching Essentials Workshop.

The University of the West Indies (UWI)

Enrolment and Graduation

Enrolment of Jamaicans at the three campuses of the UWI[33] increased by 9.1 per cent to 15 432 students (69.0 per cent female) (Table 22.14). Of this number, 71.3 per cent were enrolled full-time. The growth in enrolment at Mona coincides with increases in registration at its Open Campuses and in the range of programme options and offerings. At the Mona campus there were 15 027 Jamaican students (69.0 per cent female); at the St. Augustine campus 212 (54.2 per cent male); and on the Cave Hill campus 193 (76.7 per cent female). Approximately 1 487 or 9.1 per cent of the total number of students enrolled at Mona were regional and international students. The number of Jamaicans enrolled in undergraduate programmes increased by 8.7 per cent to 12 186. For higher degrees, enrolment increased by 7.1 per cent to 3 002. The Faculty of Social Sciences accounted for 35.6 per cent of those registered, followed by Humanities and Education (31.5 per cent) and Medicine (17.5 per cent). Enrolment in the Faculty of Social Sciences at the baccalaureate level continued to dominate total registration accounting for 37.8 per cent, followed by Science and Technology, which accounted for 20.0 per cent.

Total output of Jamaican students[34]from the UWI marginally declined by 1.9 per cent to 3 081 (74.4 per cent females) in 2012/13. Undergraduate degrees accounted for 75.2 per cent, and higher degrees for 22.5 per cent, while diplomas and certificates together represented 2.3 per cent. The top four areas of study among undergraduates were:

- MBBS in Medicine and Surgery, 281 persons
- BSc. in Nursing, 220 persons
- BSc in Management Studies (Accounting), 149 persons
- Bachelors in Education, 141 persons.

At the higher degree level, the highest representation came from the M.Ed. in Education Administration, 69 persons, and the M.Sc. in Accounting, 49 persons.

New and Enhanced Academic Programmes

In response to market demand for specialist skills, as well as developments in new knowledge areas, several new programmes and courses were introduced during the 2012/13 academic year. The Faculty of Science and Technology developed and obtained approval for a new BSc in Computer System Engineering programme which targets students desiring careers designing computer systems and devices which rely on embedded computing. The faculty adopted the BSc in Civil Engineering programme offered by the Faculty of Engineering at the UWI, St. Augustine Campus, for full delivery at Mona.

As of 2013/14 academic year, the slate of courses in Critical Reading and Writing will target the specific communication skills. The Department of Library and Information Studies overhauled its technology courses and developed new undergraduate courses in Database Management, Information Technology and Digitization. The Department of History and Archaeology designed new courses in 20th century European History as well as a new cluster of courses on the history of Asia and the Middle East. The Institute of Caribbean Studies (ISC) developed two new Level III courses, Commercialization of Modern Sport and Artist Management.

The Western Jamaica Campus (WJC) continued efforts to increase its range of programmes, and the Bachelors in Law (LLB) programme was reintroduced. The BSc in Information Technology and BSc in Human Resource Management (HRM) programmes were introduced during the last academic year.

In September 2012, the Faculty of Social Sciences received its first cohort 18 students for the new MSc in Enterprise Risk Management (MSc ERM) programme. Additionally, the Department of Government delivered two new graduate

33 Enrolment of Jamaicans at Mona, Jamaica; St. Augustine, Trinidad; and Cave Hill in Barbados.
34 Graduating students in all three campuses.

TABLE 22.14
ENROLMENT BY FACULTY AND GENDER,UWI, 2011/12 - 2012/13

	2011/12			2012/2013		
	Male	**Female**	**Total**	**Male**	**Female**	**Total**
First Degree						
Humanities and Education						
Humanities	390	1 073	**1 463**	407	1 078	**1 485**
Education	73	431	**504**	67	431	**498**
Total	463	1 504	**1 967**	474	1 509	**1 983**
Agriculture	3	4	**7**	1	4	**5**
Law	120	426	**546**	160	471	**631**
Engineering	26	6	**32**	26	7	**33**
Medical Sciences	392	1 704	**2 096**	469	1 857	**2 326**
Science and Technology	1 091	1 229	**2 320**	1 159	1 268	**2 427**
Social Sciences	1 298	2 775	**4 073**	1 482	3 122	**4604**
Gender & Development Studies	46	119	**165**	49	128	**177**
Sub-Total	3 439	7 767	**11 206**	3 820	8 366	**12 186**
Certificate						
Humanities and Education						
Humanities	1	0	**1**	3	0	**3**
Education			**0**			**0**
Sub-Total	1	0	**1**	3	0	**3**
Agriculture	1	0	**1**	1	4	**5**
Medical Sciences			**0**			**0**
Social Sciences	1	1	**2**	0	1	**1**
Sub-Total	2	1	**3**	1	5	**6**
Diplomas						
Humanities and Education						
Humanities	3	3	**6**	3	6	**9**
Education			**0**			**0**
Centre for Development for Gender Studies			**0**			**0**
Social Sciences	4	10	**14**	8	22	**30**
			0			
Sub-Total	7	13	**20**	11	28	**39**
Advanced Diplomas						
Humanities and Education						
Humanities			**0**	1	0	**1**
Education			**0**			**0**
Medical Sciences	4	8	**12**	0	8	**8**
Engineering			**0**			**0**
Science and Technology			**0**			**0**
Social Sciences	4	18	**22**	9	16	**25**
Law						**0**
Sub-Total	8	26	**34**	10	24	**34**
Associate Degree						
Medical Sciences			**0**	1	18	**19**
Sub-Total			**0**	1	18	**19**
Higher Degree						
Humanities and Education	191	713	**904**	200	746	**946**
Engineering	42	8	**50**	39	11	**50**
Agriculture	11	2	**13**	10	1	**11**
Science and Technology	176	161	**337**	176	188	**364**
Law	2	6	**8**	2	5	**7**
Medical Sciences	116	344	**460**	141	383	**524**
Social Sciences	317	686	**1 003**	335	734	**1 069**
Centre for Development for Gender Studies	5	23	**28**	4	26	**30**
Graduate Studies	0	0	**0**	1	0	**1**
Sub-Total	860	1 943	**2 803**	908	2 094	**3 002**
Special Admittance	23	50	**73**	36	107	**143**
TOTAL	**4 340**	**9 800**	**14 140**	**4 790**	**10 642**	**15 432**

Note: Special Admittance Diploma - 84 students were given special admittance to various faculties

Source: The University of the West Indies

TABLE 22.15
ENROLMENT & GRADUATION AT UNIVERSITY OF TECHNOLOGY, JAMAICA BY SCHOOL/DEPARTMENT, 2010/11-2012/13

Faculties	No. Enrolled 2010 -2011			No. Graduated 2010 -2011			No. Enrolled 2011-2012			No. Graduated 2011-2012			No. Enrolled 2012-2013			No. Graduated 2012-2013		
	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**	Male	Female	**Total**
College of Health Sciences	292	1 470	**1 762**	34	297	**331**	346	1 627	**1 973**	74	366	**440**	213	1 334	**1 541**	27	304	**331**
Faculty of Education and Liberal Studies	444	738	**1182**	112	176	**288**	397	772	**1 169**	64	189	**253**	409	747	**1 156**	77	137	**214**
Faculty of Health and Applied Sciences																		
Faculty of the Built Environment	750	315	**1 065**	152	66	**218**	764	307	**1 071**	160	82	**242**	763	295	**1 058**	174	85	**259**
College of Business and Management	1 767	3 988	**5 755**	245	681	**926**	1 643	3 742	**5 385**	276	744	**1 020**	1 580	3 606	**5 182**	223	657	**880**
Faculty of Engineering and Computing	1 964	488	**2 452**	361	97	**458**	1 875	458	**2 333**	315	105	**420**	1 847	423	**2 270**	266	94	**360**
Faculty of Law	173	389	**562**	15	25	**40**	189	443	**632**	47	112	**159**	168	433	**601**	25	78	**103**
Faculty of Science and Sport	126	189	**315**	6	11	**17**	181	267	**448**	6	7	**13**	260	359	**619**	8	23	**31**
College of Oral and Public Health Sciences													126	471	**597**	24	144	**168**
GRAND TOTAL	**5 516**	**7 577**	**13 093**	**925**	**1 353**	**2 278**	**5 395**	**7 616**	**13 011**	**942**	**1 605**	**2 547**	**5 366**	**7 668**	**13 034**	**824**	**1 522**	**2 346**

Source : University of Technology , Jamaica

courses, International Security and Global Political Economy and Climate Change. The Department also introduced three new undergraduate courses, Internet and Democracy, Political Marketing and Communication, and Political Management and Strategy.

Electronic textbooks were introduced to students in the Faulty of Medical Sciences at the start of the last academic year. A first in the English-speaking Caribbean, it provided each student with a tablet computer loaded with the 18 core texts needed for their entire programme of study. Access to the e-books is provided at US$199.76 per annum. The "e-books on tablet computers" solution was later rolled out some 150 students in the Mona School of Business and Management's MBA programmes.

During the 2012/13 academic year, a number of units secured internship arrangement with various private sector entities, facilitating students' exposure to real work situations. In February 2013, the Mona School of Business and Management signed an agreement with the Musson's Group of Companies and launched a formal internship programme. Students enrolled in Archaeology, Education, Entertainment and Cultural Enterprise Management, Integrated Marketing and Communication, Journalism, Library Studies, Modern Languages and Government courses benefited from internship experiences.

Research

The UWI Development and Endowment Fund (UWIDEF) approved a grant of $60 million to UWI SODECO (Solutions for Developing Countries). The grant will be used to refurbish and equip laboratory facilities involved into the prevention and treatment of obesity and its related chronic diseases, namely, hypertension, diabetes and heart disease.

Graduate students at Department of Computer Science and Department of Physics developed the Real Time Monitoring and Alert System (RTMAS). The RTMAS has the capacity to simultaneously monitor multiple environmental parameters and pollutants. Under the supervision of faculty members, a Ph.D candidate successfully isolated compounds from the eucalyptus plant which show hypoglycaemic and hypotensive effects comparable to the popular drugs Metformin and Captopril RIL.

The University of Technology (UTech) Jamaica

Enrolment at UTech was at 13 034 students (58.3 per cent female) compared with, 13 011 (58.5 per cent female) in 2011/12. However, graduates increased to 2 346 (64.9 per cent female) which showed an increase in output by 7.9 per cent (Table 22.15). The College of Business and Management and the Faculty of Engineering and Computing accounted for 7.1 per cent of total enrolment and 52.9 per cent of output.

During the review period, significant achievements/activities included:

- Diversification and expansion of undergraduate courses of study in new disciplines including the Post-Diploma in Information & Communication Technology, BSc. Degree in Actuarial Science, BSc in Mathematics and Education, BSc in Midwifery (BSM), and MSc Degree in Mathematics Teaching
- Launch of the Caribbean School of Nursing and the School of Allied Health & Wellness and the Shelly-Ann Fraser-Pryce Assessment Centre for Children, in the College of Health Sciences
- Change in designation of the Department of Liberal Studies to the School of Humanities & Social Sciences
- Commencement of the BSC in Nursing (BSN) Completion Degree in January 2013 at the St. Vincent & the

Grenadines Community College (STVGCC) under a franchise arrangement

– A Memorandum of Understanding for the expansion of the franchise operated with Community Colleges was extended to Knox Community College, Mandeville, to pursue the BBA Degree Course of Study (Levels I and II).

Office of Distance Learning

For 2012–2013, several strategic online-blended learning initiatives were accelerated through collaborative efforts among UTech faculties/colleges, central units and external partners. Key accomplishments were:

– Mobilization of resources by at least four faculty/colleges to develop five online-blended courses of study and seven general education/service modules for delivery in the upcoming academic year

– Expanded virtual access across three campuses with the introduction of a proprietary web-conferencing system as a delivery mode

– Incorporation of over 30 modules within UTech Online LMS resulting in access by over 5 000 students to basic course materials and web resources, while enhancing teaching and learning strategies.

Curriculum Development

A number of existing undergraduate courses of study were redesigned based on feedback from the internal and external stakeholders. The following new graduate courses were developed and ratified during the period:

– MSc in Engineering

– MPhil/PhD Science

– MSc in Health Administration – Pharmaceutical Sector Management

– Post-graduate Diploma in Health Promotion

– MSc in Mathematics Teaching (a collaboration with Church Teachers' College)

College of Health Sciences

The Caribbean School of Nursing (CSON), UTech, fully assumed the Kingston School of Nursing (KSN) training programmes. The Bachelor of Nursing degree for registered nurses is also currently being offered in St. Vincent and the Grenadines and at the Barnett Campus in Montego Bay. For the period under review, a total of four new courses of study were approved to be offered for 2013/2014 Academic Year: MSc in Corporate Wellness Facilitation, BSc in Pharmacy (Post Diploma Online/Blended), BSc in Midwifery and Post RN BSc in Nursing.

Faculty of Engineering and Computing

The School of Engineering launched the Master of Science (MSc) Degree in Engineering in March, 2013. Areas of specialization include Agricultural, Chemical, Civil, Computer, Electrical, Industrial and Mechanical Engineering, Energy Management, and Engineering Management.

The University through grant funding and £421,000 from the African, Caribbean and Pacific Group (ACP) and the European Union (EU) launched in October 2012 its research project entitled "The application of Solar-Powered Polymer Electrolyte Membrane (PEM) Electrolyses" for the sustainable production of hydrogen gas as fuel for domestic cooking. The funding will support collaborative work led by a team in the School of Engineering at UTech with persons from Brunel University, London; the University of the West Indies; the Ministry of Science, Technology, Energy and Mining (MSTEM); and the Bureau of Standards Jamaica.

The Faculty of Engineering and Computing (FENC) collaborated with MSTEM to build an information system, the Energy Database and Management Information System (EDMIS). The EDMIS enables the capture, process, and use of energy-related data to enhance the decision-making capabilities of the stakeholders in the MSTEM.

Faculty of Science and Sports

New Courses of Study were a MA/DPhil in Chemistry and BSc in Mathematics and Education offered to diploma graduates of the Teachers' Colleges. The Master's degree in Mathematics Teaching is designed to equip graduate students with the skills to identify and respond to deficiencies in mathematics teaching and learning.

Western Campus (UTech Academy)

The UTech Academy with its Pre-University, Professional Development and Continuing Education offered short courses at all UTech Campus sites and the UTech/Jamaica Institute of Management School of Advanced Management (SAM) with delivery points in Port Antonio, Ocho Rios, Montego Bay, Negril, and Kingston. Some 18 students were transferred into full-time programmes in the Faculty of Science and Sports (FOSS), College of Health Sciences (COHS), Faculty of Education and Liberal Studies (FELS), Faculty of Engineering and Computing (FENC), and College of Business and Management (CoBAM). Newly matriculated students are studying toward degrees in Pharmacy, Family and Consumer Studies, Applied Science, Electrical Engineering, Dental Laboratory Technology, Nursing, Business and Computer Studies and Civil Engineering. The University entered into a Memorandum of Understanding (MoU) with the Rural Family Support Organization (RuFamSO) to offer a Certificate Programme in Child Care and Adolescent Development (CHAD) which began in May 2012.

Special Projects

UTECH Enhancement Project: The project is designed to enhance UTECH's capacity to provide quality tertiary level education to meet national needs. The project currently in the infrastructural development phase is financed by the CDB/UTECH at a cost of US$25.9 million; the year to date expenditure is $97.8 million.

Private Tertiary Institution

Northern Caribbean University (NCU)

Enrolment of Jamaicans for all programmes at the NCU was 5 160 (75.7 per cent female). Students enrolled in Education (14.2 per cent) had the largest share of total enrolment followed by Business Administration (13.6 per cent) and Nursing (11.4 per cent). A total of 1 043 (79.4 per cent female) students graduated with the highest number in Business Administration, 214; Education, 166; and Management Studies, 158.

The Department of Business Administration and Hospitality Management implemented two new

programmes—Certificate Course in Fruit & Vegetable Carving and Postgraduate Certificate in Project Management.

Three new programmes were designed by College of Education and Leadership—B.Sc. Special Education, Doctor of Strategic Leadership, M.Sc. Science Education. It is expected that these will be implemented in the coming academic year.

The Post Graduate Diploma in Education (PGDE) (tertiary), introduced in July 2012, yielded its first graduate, in August 2013. The second cohort of PGDE students is being instructed using the blended approach, where 50.0 per cent of the course is being offered online and 50.0 per cent face-to-face, as opposed to the first cohort that was taught 100.0 per cent online. The following were also achieved:

- The Department of Education began processing applications for an additional modality in its programme offerings—an evening modality in selected parishes for its M.A. programmes, which will begin in the 2013/2014 school year
- The School of Religion and Theology (SRT) implemented the *Pre-Admission Curricular.* In collaboration with the Jamaica Union Conference of Seventh-Day Adventist and Atlantic Caribbean Union Mission, SRT developed this programme to enhance the preparation of students who desire to pursue evangelistic and pastoral ministry
- NCU, now a training centre for the American Heart Association employed two full-time instructors to administer Heart Savers and Basic Life Support training for off-campus and on-campus personnels
- NCU's Morris Entrepreneurship Centre signed a contract to provide Job Readiness and Entrepreneurial Training to residents in the inner-city community of Rae Town. Funding is being provided through a collaborative effort of the European Union (EU), the GOJ, JSIF and NCU
- The College of Natural and Applied Sciences developed new programmes in the areas of Agriculture and Science Education, Information Technology and Math Education. The College has also established an Engineering lab with funds received from Versacare. The College of Natural and Applied Sciences is currently involved in greenhouse technology in communities surrounding the Mandeville main campus, and biodiversity in watershed areas. The College has been actively engaged in research and publications in the following areas: agricultural crops, cancer treatment, heavy metals and mined-out bauxite lands.

Catholic College of Mandeville:

Three programmes were offered—BEd in Early Childhood, BEd in Primary Education, MEd in Teaching and Learning—at one campus in Mandeville. The College enrolled 640 students (91.6 per cent female) and 245 students (92.7 per cent female) graduated.

International University of the Caribbean (IUC)

IUC offers 37 programmes at the diploma, bachelor's degree, masters and doctoral level. Its two main programmes are the BA in Education (Primary) with some 916 (90.0 per cent female) students enrolled and the BA in Guidance and Counselling with some 471 (85.0 per cent female) students enrolled. At the post-graduate level the two most popular programmes were the MSc in Counselling and Consulting Psychology (109 students, 94.0 per cent female) and the Master of Education (University of Sheffield) with 63 students. IUC had a total of 3 147 students (84.0 per cent female) enrolled and 584 (88.0 per cent female) graduated.

University College of the Caribbean (UCC)

Professional training is offered mainly in business-related courses including: Management Studies, Business Administration, Management Information Systems, Accounting, Law and Human Resource Management. The main programmes were the ASc and BSc in Business Administration which accounts for 59.0 per cent of total enrolment. The total number of students enrolled was 3 683 (73.0 per cent female) and 522 (77.0 per cent female) graduated.

Jamaica Theological Seminary (JTS):

Students enrolled totalled 151 (70.0 per cent female) and 68 students (59.0 per cent male) graduated. The JTS offers six programmes at the baccalaureate level, one at the diploma level and one at the certificate level in the general fields of theology, social work and teaching.

B & B University College:

The College offers undergraduate and graduate programmes in the areas of Accounts and Finance, Civil Engineering and Construction, Business Administration and Management, and Human Resources. Some 400 students (84.0 per cent) were enrolled and 100 students graduated.

SECTION 6: EDUCATION SUPPORT PROGRAMME, PROJECTS AND SERVICES

The School Feeding Programme (SFP)

The School Feeding Programme continued to be an integral part of the Ministry of Education's Welfare Programme. The main objectives of the programme are to:

- encourage regular school attendance.
- alleviate hunger, and enhance the learning capacity of the students by providing a meal or snack.
- educate the children on the value of food through nutrition education classes
- encourage the children to grow their own food by establishing and/or supporting school gardens
- supply at least one-third of the child's daily caloric requirements

There are three programmes within the Ministry's portfolio which assist in improving the nutritional status of students:

The Nutribun and Milk Component – this programme is largely the responsibility of Nutrition Products Limited, an Agency of the Ministry of Education. It is charged with the responsibility of preparing and distributing milk or a drink and a solid (cheese bread, bun, rock cake, bulla, spice cake) to 13 7000 beneficiaries each day. The cost of a Nutribun snack (solid and liquid) is $2.00.

A pilot Breakfast Programme was introduced to approximately 8 200 beneficiaries in the Region 1. In addition all ovens and boilers were converted from Automotive Diesel Oil to Liquid Petroleum Gas.

The Traditional Cooked Lunch Component – this programme facilitated the provision of cooked meals for approximately 176 000 beneficiaries in 636 schools. The Ministry paid a subsidy of $450.00 per capita for these students at all levels of the education system excluding tertiary. In addition to the subsidy, the Ministry also supplied grocery items[35] to supplement the programme. Students contributed between $30 and $170 per meal. These contributions along with the subsidy from the Ministry, were used to assist in paying cooks and purchasing cooking gas, protein and other necessities for meals. The Early Childhood Commission also provided budgetary support in the form of a Nutrition Subsidy at the rate of $250.00 per capita for children in Recognized Basic Schools. The same grocery items were also provided for 86 000 children in these schools.

The PATH Nutritional Support Programme[36] – financing for both component of the School Feeding Programme and the PATH Nutritional Support Programme are funded from the national budget. The budgetary allocation included:

- Nutrition Products Ltd valued at $807.0 million
- Early Childhood Commission Nutrition Subsidy valued at $42.0 million
- School Feeding Unit valued at $2.8 billion
- Feeding Grants valued at $84.6 million
- PATH[37]valued at $2.747 billion.

Beneficiaries of the Programme – the number of students who benefited from these programmes are as follows:

- Traditional Programme (Feeding Grants and Commodities), 176 000
- Basic Schools (Commodities), 86 000
- Nutrition Products Ltd, 137 000
- PATH Nutritional Support, 211 000

Breakfast Programme

In November, a breakfast pilot programme began in Infant Schools and Infant Departments in Regions 2-6. The number of students targeted to benefit from a fully subsidized breakfast was 4 995 (50.0 per cent). Schools were provided with a two-week cycle menus and an allocation of $100.00 per child. The amount of $55.0 million was allocated for this pilot.

Guidance and Counselling

The Guidance and Counselling Unit of the MoE is responsible for the development and management of schools' guidance programmes. To date, the Unit held several activities covering various areas including.

- proposal was developed for an Early Detection Support and Intervention System that will use the School-Wide Positive Intervention and Support (SWPBIS) Framework
- training of Guidance and Counselling Education Officers in Psychological First Aid (12), Anger Management, Conflict Resolution Skills and Child Rights and Responsibilities (85), and in Crisis of Missing Children (38)
- production of a National Policy for the Reintegration of School Aged Mothers into the Formal School System
- discussions with the Ministry of Justice for the incorporation of Restorative Justice practices in school
- collaborated with Tackle-Jamaica, to raise awareness about child labour amongst sports coaches and guidance councillors in 100 rural schools
- developed the MOJ Child Diversion Policy – National Assessment Tool with a Common Assessment Tool (CAT) to be used to improve the capacity of key agencies in identifying needs and risks of children in conflict with the law
- assisted with five trauma interventions in schools in St. Catherine
- introduced the Health and Family Life Education (HFLE) Programme to approximately 621 of EC practitioners equipped with knowledge and skills to facilitate delivery of the EC HFLE Curriculum**.** The Curriculum for Grades 7 – 9 was revised
- approved for implementation anew approach of the Early Detection Support and Intervention (EDSI) System. The EDSI system is to be implemented in schools using the School-Wide Positive Behaviour Intervention Support (SWPBIS) Framework.

EDUCATION PROJECTS

GoJ/IADB Modernizing the School Feeding Programme

The goal of the project is to contribute to the policy and institutional reform of the School Feeding Programme towards improving regular school attendance among students from the poorest income quintiles. The specific objectives are to improve the programme's operations by (i) modernizing and upgrading its managerial tool kit and organizational structure; and (ii) generating evidence to improve the nutritional quality and efficiency of its snack component.

CDB/GOJ Enhancement/Construction of Basic Schools and Resource Centres

This project, financed at a cost of US$15.9 million was established to enable young children to learn and develop optimally. To date, 12 basic schools and resource centres were constructed and civil works was at 98.0 per cent completion. However, still outstanding are the commissioning of the sewer system at Foga Road, correction of defects at Shortwood Basic

35 Rice, Flour, Cornmeal, Vegetable Oil, Corned Beef and Tinned Jack Mackerel

36 The PATH Nutritional Support Programme offers students both the Nutribun and Milk Component and the Traditional Cooked Lunch Component.

37 PATH Nutritional Support Budget was increased; 5 000 infants received $61.00 up from $46.00; 206 000 older students received $72.60 up from $62.00

School, the finalization of accounts, and the payment of retentions for five schools.

Jamaica Early Childhood Development Project

The Project supports the implementation of the National Strategic Plan on Early Childhood Education. It is sponsored by the World Bank/UNICEF to the tune of US$15.0 million. This project ended in September 2013 with one deliverable outstanding, the purchase of computers for field staff of the ECC.

The Project for the Advancement of Childhood Education, (P.A.C.E., Canada) adopted 300 early childhood institutions (ECIs) across Jamaica in provision of teaching and learning resources and equipment. They awarded 50 NCTVET Level II early childhood programme scholarships to practitioners working in ECIs. P.A.C.E. (Canada) also supported the 14 parish-based early childhood development resource centres by supplying them with early childhood learning materials for use with children, practitioners, teachers and parents.

In honour of Jamaica's 50th year of independence, Food for the Poor (FFP) committed to building 50 ECIs over a five-year period and training of 500 ECPs in NCTVET Level II early childhood programme. The investment to the development of quality of early childhood facilities yielded 17 new institutions and 32 practitioners commenced the training programme.

Do Good Jamaica's Crayons Count campaign to support early childhood learning, provided kits to over 2 000 ECIs across Jamaica. The kits included items such as puzzles, balls, paint, paint brushes, puppets, books, building blocks and crayons aimed at supporting the Jamaica Early Childhood Curricula and school readiness.

Through the Quality Education Programme, the United Nations Children's Fund (UNICEF) assisted in building the capacity of early childhood development in Jamaica with the development of three screening tools (Families at Risk, Child Development, Age Four Assessment). The development of an Early Childhood Development Policy and support to students in the Child Development Therapy (CDT) Diploma Programme is aimed at equipping the sector with specialists to work with children with special needs.

USAID/ GOJParent- School Partnerships for Improved Literacy Outcomes

The Project aims to: i) provide parents with the necessary training and support for positive parent/child home literacy activities, such as increasing the frequency for parent-child home discussions around reading activities; ii) contribute to the development of quality support systems for parents; and iii) establish and strengthen Parent Teachers Associations (PTA's) in participating schools in order to facilitate home literacy activities. The following milestones were achieved:

- assisted in institutional strengthening in the 60 participating schools
- conducted workshops for Principals and Grade 1 teachers focusing on best practices for administrators to engage parents, and how parents can be assisted and supported with home literacy activities for their children
- convened parent engagement meetings/activities with parents in the 60 schools and encourage parents to partner with the school administrators and teachers with the aim of improving students literacy at all levels. One incentive of the parent-engagement activities was the receipt of book bags and reading materials for the parents of Grade 1 students to foster the improvement of home literacy with their children
- established 60 Grade 1 libraries, one in each project school, with each school receiving a kit (consisting of over 130 reading books, DVDs and other educational tools) for each library. Parents are given the opportunity to borrow books from the libraries for a specified time
- established 60 Parents Places equipped with a minimum of one computer, overhead projector, television, reading books, DVD player, and auto skills software (a tool used for assisting parents to read).

IADB/ GOJ Primary Education Support Project

The project provided for expanded access to the primary school system and is financed at a cost of US$36.4 million. Red Hills Primary was 99.0 per cent completed.

MoE/USAID Partnership for Improved Reading Outcomes

The project is funded by USAID at a cost of US$3.0 million, it aims to improve school performance in reading in 450 selected schools and improve the capacity within the six MoE regional offices over two years. The following activities were conducted under the project:

- 90 Reading Coaches and staff for the project officer were contracted
- two training and sensitization workshops conducted for the Reading Coaches
- assessments were conducted for Grade 2 students in 150 schools.

UNICEF Project Activities

GOJ/UNICEF Promoting Quality Education and advancing the reality of a Child Friendly Environment Project: by 2016, all students in the target schools should demonstrate increased readiness to transition between levels of the education system. UNICEF is spearheading this venture valued at $18.0 million. A National Guidance and Counselling Policy was prepared and stakeholder consultations were conducted for finalizing the policy. Additionally, a manual is to be developed for the Programme for Alternative Student Support (PASS) and a contract of $2.5 million was approved. Under the special education component, two workshops were conducted for special education practitioners.

The project activities were organized into two components—the development of a curriculum for children with moderate to profound intellectual disabilities, and capacity building in deaf education through a bilingual-bicultural approach. Two consultants, a curriculum specialist and a special educator were contracted to develop a curriculum for students with moderate to profound intellectual disabilities and an eight-day workshop was conducted. A draft document with three of the five disciplines to be developed was prepared for pilot testing.

The Jamaica Sign Language (JSL) component of the project involved the training of 25 deaf trainers of trainers. These trainers have since provided training in understanding deaf culture, developed JSL Deaf Standards and the use of various

deaf communication techniques to 60 teachers of the deaf, 40 school administrators, and 29 deaf culture facilitators.

***The Business Process Outsourcing Centre*:** the project is intended to provide employment to students to assist them in funding their education, while providing an additional revenue stream for the UWI Mona Campus. Employment to the BPOC exceeded 700 students.

***The One Laptop per Child Project*:** the initiative was launched in 2011 and 20 students were provided with laptops under the project being funded by Grace Kennedy/Western Union Foundation. The project seeks to provide learning opportunities for children in Jamaica's poorest communities and has so far assisted 115 3-6 years old from surrounding communities.

Gates Foundation Grant: the Bill & Melinda Gates Foundation awarded the Jamaica Library Service, a programme of the Jamaica Library Board, a grant for the project *ÒJLS: Using Technology to empower Individuals and Communities for DevelopmentÓ*. The project supported the provision of increased public access to information through technology in public libraries with training for users and library staff.

Jamaica Social Investment Fund (JSIF): to date, JSIF has disbursed approximately $2.3 billion in community development activities. Under the JSIF Education intervention programmes approximately 106 601 persons benefited through 148 Education Related Socio-Economic Projects including Education Training Programmes, Skills Training, Capacity Building and Life Coping Skills, Infrastructure Development, and Organizational Strengthening.

Safe Schools Programme

The Safe Schools Programme is a multi-disciplinary and multi-agency initiative that was designed in 2004 to reduce the incidence of violence in schools. The Programme includes: the placement of a law enforcement officer (School Resource Officers SROs) in each school that has safety and security problems; the appointment of Deans of Discipline; and the establishment of safety and security patrols for schools grouped in clusters. The principal partners in this programme are the MOE, the Ministry of National Security, the Ministry of Health (MOH) and the Jamaica Constabulary Force (JCF). The Safe School Programme operated in 154 schools and involved 274 SROs (157 SROs in 2012). Available data showed that 40 students were arrested for varying infractions, 555 cautioned, and 245 monitored. Some 9 129 searches were conducted and 302 contraband items were seized. The SRO conducted 1985 lectures and 8 328 hours were spent in these schools (see chapter 24 on National Security and Justice).

National Library of Jamaica

The National Library of Jamaica (NLJ) is a research library with mandate to collect, catalogue and preserve the nation's publications and to make those publications available for study and research. The collection mandate is aided by the Legal Deposit Act, 2002 which requires every national publisher to deposit two copies of a print publication and one copy of an audio or moving image publication to the National Library within one month of the publication.

A highlight of 2013 was the launch of the National Library of Jamaica Digital (NLJ Digital) collection. NLJ Digital is an expansion of the library's already existing digital collection and the National Library's implementation of the *Vision 2030 Jamaica* task Òto create a digitized encyclopaedia of Jamaica for local and global referencesÓ and includes materials from the library's collection[38].

The NLJ in collaboration with the Ministry of Tourism and Entertainment launched the programme for the public nomination of a Poet Laureate of Jamaica. The Poet Laureate is charged with stimulating a greater appreciation for Jamaican poetry, while trying to develop mass appeal for poetry as an art and medium for developing and disseminating our cultural heritage. The Poet Laureate will be expected to:

- present public poetry related seminars/readings/promotions within the island, and possibly overseas
- promote reading and Jamaica literature, with an emphasis on poetry
- undertake Poet Laureate Duties such as writing poetry for national events
- participate in a minimum of two national events in each calendar year
- create a publication related to Jamaican poetry.

A secondary mandate of the NLJ is to coordinate development of the National Information System named the Jamaica Libraries and Information Network (JAMLIN). This system is a network of library networks in MDA's which has been grouped according to subject areas, namely:

- Audio-visual Information Network
- College Libraries and Information Network
- Jamaica Agriculture and Documentation Information Network
- Legal Information Network
- Socio-Economic Information Network
- Scientific Information Network

The National Library of Jamaica distributes and supports the low cost library management system CDS-ISIS to sector network libraries and collects cataloguing records from them for addition to the Jamaica Bibliographic Database, which is a listing of the holdings in the network libraries as well as in the National Library. At December 2013, there were 191 110 records in the bibliographic database, an addition of 12 525 compared with 2012.

The Jamaica Library Service (JLS)

The Jamaica Library Service continued to provide programmes and services through its Public Library Network consisting of 633 Service Points, 508 of which were operational, and the School Library Network consisting of 927 School Libraries, 841 of which were operational. Registered membership throughout the Network at November 2013 was 509 385.

38 The collection can be accessed at http://www.nlj.gov.jm.

School Library Network

For the period April 2012 – March 2013, a total of 29 456 items of resource material were purchased at a cost of $27.8 million. The Network continued to be the recipient of resource material donated by individuals and organizations. Some 1 368 items of resource material were received which comprised 1 090 books, 125 booklets, 25 magazines, 10 CDs, 30 DVDs, 13 posters and 75 brochures. In addition, 25 periodicals were received as donations.

E-Learning Jamaica (e-LJam) Project

The primary goal of the e-Learning Jamaica Project is to contribute to improving the quality of education for Grades 7–11 in 203 educational institutions islandwide. The e-LJam project promotes the use of state-of-the-art information and communication technology (ICT) to enhance the learning experience and improve the level of passes in the CSEC examinations. In 2013, the Project completed computer network installation in the remaining three schools; delivered mobile kits to all project schools (10 net-books per kit); and acquired and installed fixed and mobile interactive whiteboards.

The Project installed the Central Repository for an Educational Materials (CREM) at the MOE with programmatic support (Interim repository on e-LJam website). Teachers and Students Instructional Materials (TIMs and SIMs) were developed for seven subjects (Building Technology, Physics, Geography, Spanish, Integrated Science, Social Studies, Instructional Technology).

The E-LJam project also

- provided integrated learning software to 30 low-performing schools and evaluated for possible roll-out to another 100 schools
- completed writing and reviewing of questions for item bank (Target 22 000 for grades 10 & 11, (2 000 per subject) 12 000 for Grades 7 – 9 (1 000 per subject per grade for 4 subjects)
- finalized production of video lectures for the remaining 6 subjects (Target 110 videos, 10 per pilot subject)
- purchased appropriate software for managing content on CREM
- trained an additional 2 000 teachers in Technology Integration and 120 systems administrators
- implemented the Education Technologist Function in the teachers colleges
- provided specialised equipment to the six special schools in the project
- completed the technology enrichment pilot intervention in literacy and numeracy and evaluated intervention for future replication in 30 low-performing schools
- Rolled out CXC endorsed diagnostic tests at Grades 7 and 9 in English, Mathematics, Integrated Science and Social Studies in 166 high schools
- Conducted needs assessment for the design of a Primary School E-LJam Project.

TVET Rationalization Project

The focus of the Project was the infusion of TVET in the school system with an emphasis on curriculum reform. The interventions are outlined below:

TVET Integration at Grades 1 – 3

- TVET infusion of foundational skills e.g. measuring, drawing, cutting, safety in the use of simple tools e.g. scissors, rulers
- focus on technical careers among community workers.

TVET Orientation Grades 4-6

- resource and technology were introduced at Grades 4 – 6 as a precursor to Grades 7 – 9 programme. Real life projects have been designed to build foundational skills in TVET. Students will have an opportunity to conceptualize and create solutions for every day problems e.g. design and make functional toys, identifying business opportunities, create fashion accessories, and develop simple agricultural projects e.g. container gardening.

TVET Exploration Grades 7-9

- the existing programme has been revised to introduce new knowledge and emerging skills in real life context.

TVET Career Focus Grades 10-11

- programmes have been expanded to include qualification in new and emerging specializations.

National Council on Education (NCE)

The NCE is a statutory body operating as an agency of the MOE. It was established in 1993 as the major policy advisory body to the Minister of Education.

The NCE was recently mandated, by the MOE to lead the longstanding review of the Education Regulations (Code), 1980. This is in keeping with the Council's mandate as the major policy advisory body on educational matters. A steering committee was established and a sectional review approach utilised, based on six thematic categories. A consultation was held in December 2013 to sensitize stakeholders about the review process and the protocol for submitting comments/recommendations on the Code with deadline set for January 31, 2014.

Two legislative functions of the National Council on Education are co-ordinating the appointment and training of school board members. The Council is responsible for recommending, to the Honourable Minister of Education, nominees to serve on the boards of approximately 1 020 public educational institutions. Ensuring that school boards are appointed on time is critical to the transformation process. In an effort to execute this mandate more efficiently, a number of activities were pursued. These included:

- nominating fit and proper persons to serve on school boards
- preparing collateral materials to support the training of school board members
- maintaining a comprehensive database which provides ready access to information on school boards inclusive of membership, school type, ownership status, ap-

pointment and expiry dates, and location according to educational region and political constituency.

In keeping with the cyclical appointment process, the tenure of school boards in Regions III and V ended on the 31st of March and December 2013, respectively. In pursuit of the mandate to promote good governance within schools and facilitate improved student outcomes, approximately 84.0 per cent or 123 school boards were appointed on-time in Region V and 87.0 per cent or 107 school boards in Region III. The definition for on-time appointment was modified to mean appointed prior to the termination of the tenure of the outgoing school board.

The School Board Directory was updated to include the newly appointed Boards of Management in Regions IV and V. Changes in other regions were also made during the year resulting from the resignation and death of existing members.

The Handbook ***'All Hands On Board',*** published by the NCE as a resource guide for school board members, was launched in April 2013. The handbook was developed to complement the Education Regulations, 1980, to ensure that school boards function more effectively in performing their duties. It was also designed to assist them in maximising their legal authority under the law. Over 1 800 handbooks were distributed to schools in the six educational regions, to Ministry officials inclusive of Regional Directors and Education Officers, agencies of the Ministry such as the JLS and other key stakeholders. A copy of the handbook can be accessed via the Council's website at **www.nce.org.jm.**

School Board Training was financially supported by the Education System Transformation Programme (ESTP) of the MOE. The Council trained 1 616 board members representing 456 public educational institutions in 15 training sessions in Regions 1 (Kingston and St. Andrew), Region II (St. Thomas, St. Mary and Portland) and Region IV (St. James, Westmoreland and Hanover).

Jamaican Foundation for Lifelong Learning (JFLL)

The JFLL is an agency of the MOE charged with the execution of adult and youth learning and lifelong learning interventions from basic literacy to the secondary level. JFLL offers programmes of study ranging from basic literacy and numeracy up to the level of CSEC subjects in a variety of disciplines and courses in computer applications usage. These courses are offered in its Adult Education Centres (AECs), schools and workplace interventions. The flagship programme of the JFLL, the Lessons in English Numeracy and Survival (LENS) Programme had 5 424 learners (55.0 per cent female) enrolled. Of the 1 725 learners assessed, 79.0 per cent or 1 371 were certified as literate at Level III and IV.

In 2013, the JFLL assumed full responsibility for management of the Career Advancement Programme; upgraded IT infrastructure to facilitate greater use of Auto Skills literacy and numeracy teaching aid in AECs; partnered with an external vendor to develop a digital platform and content to deliver an online component of the HSDE; and began phased implementation of an automated student management system for registry and parish operations.

SECTION 7: REGULATORY BODIES

Jamaica Tertiary Education Commission (J-TEC)

The government continued its thrust towards strengthening tertiary institutions in Jamaica in order to achieve a system of the highest quality. During the academic year, J-TEC was established. The mission of J-TEC is to enhance the Tertiary Level Institutions (TLIs) to ensure that they are competitive on the local and international market. The objectives are to:

- provide management for the tertiary sector
- provide quality assurance and accreditation of TLI
- manage and monitor the allocation of Government funding to tertiary Institutions
- increase marketing of TLIs in Jamaica
- conduct research aimed at improving the tertiary sector
- update the research database for which the MOE may use to support its decisions in the making of policies
- advise the government on policy development and implementation.

During the financial year, there was significant progress in implementing the Cabinet decision to establish the J-TECH. This includes the completion of the first draft bill of the legislation to govern the operations of the Commission and give it the requisite legal authority to undertake its mandate as the body to supervise, provide oversight, and sustain the positioning of the sector to fulfil its role in national development.

Through J-TEC, compulsory registration of tertiary institutions will become a legal requirement for all institutions offering tertiary level programmes in Jamaica, whether in its real or virtual space. Any institution planning to offer a tertiary level programme must therefore apply to J-TEC to obtain a "permit to operate".

During the past year, J-TEC initiated a process to review current policies that govern tertiary education and to make recommendations for revision. A central plank of this thrust is a research project been conducted by J-TEC titled ÒCost, Eligibility and Participation in Jamaica's Tertiary EducationÓ which will provide baseline data on, inter alia motivators for choices made by students in applying to tertiary institutions; weighting given to costs vs. programme offerings in making the decision; and other factors leading to choices of institutions both locally and overseas. It is anticipated that this information will facilitate objective analyses of the sector and guide the approaches to obtaining relevance and viability and should inform policy advice on new directions and possibilities for the tertiary sector.

The Government of Jamaica has made the policy decision that the Bachelor of Education should be the minimum entry requirement for the teaching profession. This is one of the measures aimed at upgrading the teacher quality which is critical to the performance of the education system. J-TEC has played a facilitatory role both in terms of negotiating the appropriate mechanisms for granting of the degree through the colleges as well as collaborating in longer term development of the institutions. Grant funding was provided through the Inter-American Development Bank (IDB) for undertaking a needs analysis for building infrastructural capacity of the colleges.

University Council of Jamaica (UCJ)

The University Council of Jamaica (UCJ), the External Quality Assurance (EQA) Agency for tertiary education in Jamaica, continued to fulfill its primary function of 'Assuring Quality in Tertiary Education' in Jamaica. This involved the conduct of the UCJ's two main quality assurance processes of registration and accreditation, as well as related activities including the provision of:

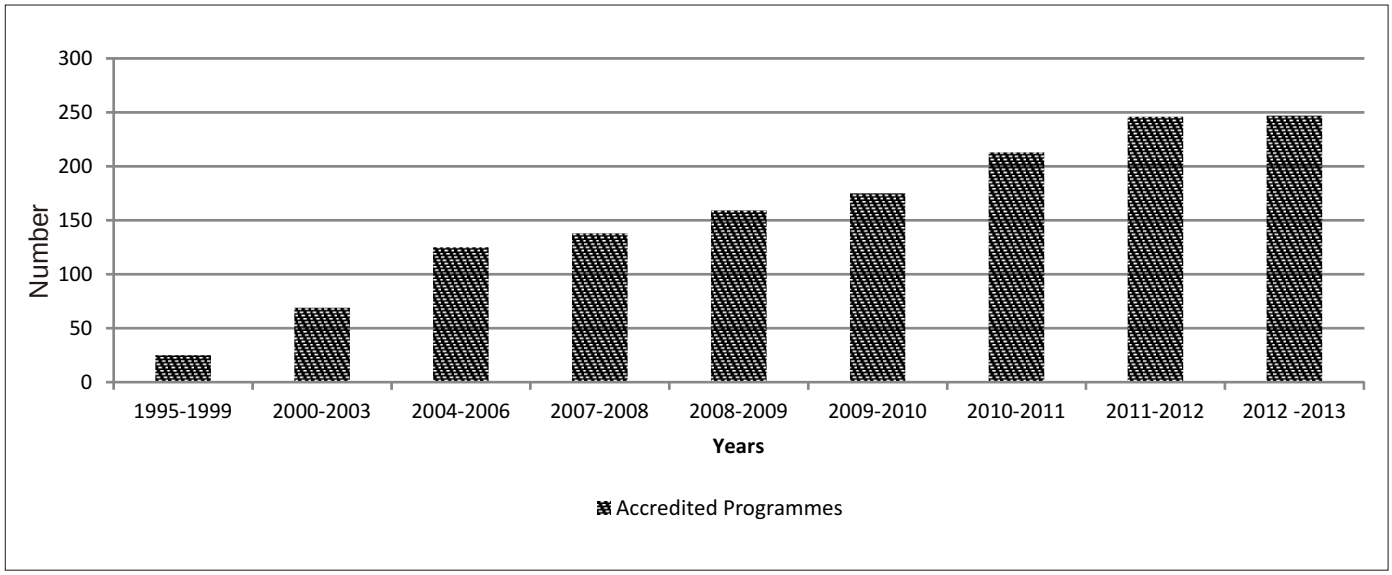

FIGURE 22F: GROWTH OF ACCREDITED PROGRAMMES

- professional advice and services for the development and improvement of institutions and programmes of study
- training opportunities for staff at institutions with respect to required standards
- appropriate public information and the institutions and programmes registered and accredited by the Council
- assurance of quality programmes being offered in Jamaica by foreign institutions.

A total of 10 visits were conducted in 9 institutions by assessors from the UCJ, for the evaluation of institutions and programmes of study for registration and accreditation. In the visits conducted, the UCJ evaluated a total of 15 programmes of study for accreditation, 2 institutions for registration and 1 institution for institutional accreditation.

The council deliberated on, and accredited/re-accredited a total of 21 programmes of study in 7 institutions, and granted 1 institutional accreditation. As at March 31, 2013, the total number of accredited programmes and UCJ-Approved degrees stood at 247 (see Figure 22F). Of that number, 26 programmes were being offered in Jamaica by overseas institutions, 20 programmes were UCJ-Approved degrees and 9 were short courses. The total number of registered institutions, as at March 31, 2013 was 46.

Council of Community Colleges of Jamaica

The Council of Community Colleges of Jamaica (CCCJ) is a statutory agency under the MOE, to supervise and coordinate the work of Community Colleges in Jamaica. There are five community and three multidisciplinary colleges with over 19 satellites/campuses islandwide which fall under the supervision of the CCCJ. Additionally, the CCCJ offers Associate and Bachelor Degrees to Anguilla Community College in Anguilla and Turks and Caicos Island Community College in the Turks and Caicos Islands. In the CCCJ's work to improve quality and access, the following initiatives were undertaken:

- a comprehensive review of the Business Studies and Environmental Studies curricula. The review process was guided by input from the University Council of Jamaica, employers, graduates, and faculty
- an agreement with Springer E-books to provide community college students with access to 36 562 e-books through online library resources
- collaborated with the Monroe College of New York for the A.Sc Degree in Criminal Justice programme and linked with the CARICOM Education for Employment (C-EFE) to offer an Associate Degrees in Logistics Management.
- a partnership with Anguilla Community College to launch the Ermine Louden Scholarship Grant valued at US $5 000.00. This scholarship is made available to a female nursing student at a local Community College.

Additionally, the Council developed the following Associate and Bachelor's Degrees:

BOX 22.5: Associate and Bachelor Degrees Developed by CCCJ

Associate Degree	Bachelors Degree
Digital Forensics	Applied Computer Science
Applied Computer Science	Information System
Information Systems	Information Technology
Psychology	

The council ratified and awarded CCCJ certification to 1 240 students; 1 127 at the associate degree level and 213 at the bachelor's level.

SECTION 8: IN-SERVICE TRAINING

Information received from eight major private/public sector companies revealed that 2 478 persons received training in areas such as Management and Administration, Computing, Banking, Financial Management and Accounting, Customer Relations and Supervisory Management. The companies' allocation for training as a percentage of their overall budget was less than 2.0 per cent.

OUTLOOK

The Ministry of Education will continue the modernization and transformation under the Education Sector Transformation Programme (ESTP) with a view to establishing a central ministry focusing on policies and standards setting while the other arms will be responsible for implementation. As the Ministry focuses on improving the quality of the outputs from the system, much emphasis is being placed on accountability at all levels. The necessary policies and structures are being developed and or implemented to effect the required changes. Like other sectors, the Ministry is impacted by fiscal constraints which affect the pace at which strategies can be implemented. Nonetheless every effort is being made to achieve the vision for the sector. Continued efforts will be made to ensure that the priorities of Special Education, Media and ICT in Education, Teacher Quality, Tertiary Sector, and Infusion of TVET in the school system are adequately addressed.

The HEART Trust/NTA in keeping with a similar focus to improve the cohort of trained certified person in the labour force, has outlined strategic initiatives to offer increased certification options, forge additional strategic partnerships to aid employment, provide stakeholders with increased access to Labour Market Information and make available to employers increased access to database on their graduates for employment

The MOE/HEART Trust/NTA has embarked on a new thrust to infuse TVET throughout the education sector with emphasis on STEM. To this end, a policy is being developed to guide the implementation of the TVET programme and curricula are being developed to support the integration and delivery of the renewed focus on STEM for Grades 1 – 9.

The quality and delivery of the education product will improve with a) plans to upgrade the entry requirement into the teaching profession from a Diploma to a first Degree; b) upgrade the quality of the intake into the pre-service stage of teacher preparation; c) offer scholarships in the areas of greatest needs such as Mathematics and the Sciences; and d) provide continuous professional development of teachers through in-service training. This will be supplemented by the registration and licensing of teachers through the JTC. Further consultations regarding the roles and responsibilities of JTC were mandated by the Minister based on enquiries from the JTA; these consultations are to be concluded by April 2014.The JTC Bill is expected to be on the legislative agenda for 2014.

The quality of tertiary education should be enhanced as the J-TEC continued its work on policy development. This is to be done through a series of symposia and conferences with broad-based stakeholder participation to obtain inputs into ensuring the relevance, peculiar niche and content for a world-class and globally competitive tertiary education system.

The streamlining of TVET in the school system coupled with the planned development of Workforce Colleges and TVET institutes will create a larger and better pool of trained personnel to populate the Jamaican Labour Market. The HEART Trust/NTA has completed labour market studies for the fields of maritime, business processes outsourcing, aviation and logistics with a view to ramp up training to a cohort of Jamaicans to take positions in these areas. In addition, training has started to qualified Jamaicans under the Renewable Energy and Efficiency Technology Programme (in partnership with the CARICOM Education for Employment Programme) and the Small Ruminants Husbandry (in partnership with the Ministry of Agriculture and Fisheries).

The pool of literate Jamaicans should improve as the JFLL implements its High School Diploma Equivalency (HSDE) programme, slated for September 2014. This programme is geared towards adult learners 17 years and older and is delivered at three tiers: Basic (Grades 1–6); Intermediate (Grades 7–9); and Proficiency (Grades 10–11).■

CHAPTER 23

HEALTH

INTRODUCTION

In keeping with the World Health Organization's (WHO) philosophy of health as a fundamental right of every citizen', health care was delivered through strategic priorities aligned with the global focus of working towards the achievement of the Millennium Development Goals (MDG). In order to realize national and global health objectives, priority programmes and projects were further aligned with the *Vision 2030 Jamaica – National Development Plan* implemented through the Medium Term Socio-Economic Policy Framework (MTF) 2012-2015. The MTF points to the critical areas of improving the well-being and quality of life in the creation of 'A Healthy and Stable Population'. During the year, the Government of Jamaica (GOJ) collaborated with multilateral agencies and accelerated actions to achieve these priorities. Such actions included an increased focus on community involvement and investment in primary health care renewal. These infrastructural and operational changes pointed to a more sustained development, benefits and efforts of which will extend into the post-2015 period. The focus of these health priorities were geared towards the enhancement of sector governance (leadership, management and accountability); improved access to quality of health care services; and reduction of injuries and premature deaths from preventable illnesses, while lessening the severity of the impact of non-preventable ones.

The Ministry of Health (MOH) continued to provide leadership on health policies and regulations, while the Regional Health Authorities (RHAs) carried out their functions as implementers of strategies and programmes. Provision of health care was measured through the progress of the achievement of health sector targets including the: health-related MDGs; *Vision 2030 Jamaica*; the MOH Strategic Business Plan; Service Level Agreements; Operational Plans; and an arrangement under the International Monetary Fund (IMF) Extended Fund Facility(EFF). The benchmark for health outlined in the EFF emphasized the need for creating greater efficiency and cost containment by reducing programme duplication and increasing cost sharing with third party players. The MOH and its four RHAs faced many challenges in their efforts to improve efficiency, quality of care, and human resource capacity within the prescribed framework. The impact of epidemiological changes in the pattern of diseases, intentional and unintentional injuries resulted in increased burden on the health system that was already challenged with inadequate human resource and equipment in the primary and secondary health care facilities. Data from the MOH indicated an increase in the usage of secondary health care services, however, mean bed complement declined while there were little changes in the staff complement.

Successes were, however, reflected in improvement of goods, services and regulatory changes in a number of areas. In an effort to reduce the rise of chronic diseases, the public health tobacco regulation was passed to facilitate the implementation of the WHO Framework Convention on Tobacco Control. In order to accelerate achievement of the MDGs, the Government continued its efforts to improve child and maternal health through programmes supported by funds from the European Union (EU). There were also several initiatives to improve health facilities islandwide. The Ministry identified a gap in addressing the health need of the 0–17 age cohort resulting in a joint initiative to ensure greater health care access for children in Western Jamaica.

Global Health Agenda

The focus on health at the international and regional levels surrounded discussions on mental health towards economic and social inclusion, as well as to secure a place for health in the next generation of global development goals. The 66th session of the World Health Assembly focused on issues surrounding women's and children's health; communicable diseases including malaria; and health financing among others. Jamaica proposed four critical areas to be included in the upcoming global agenda, namely: i) Chronic Non-Communicable Diseases, especially cancer related illnesses; ii) universal access to health care as a platform to provide a safety net against severe financial hardships; iii) social determinants of health indicating factors which affect health inequities; and iv) diagnosis and treatment of mental health. These thematic areas were aligned with the national strategic health priorities.

In an effort to strengthen global participation and contributions to Jamaica, a Diaspora advisory body for health was established to monitor health-related Diaspora affairs and missions to Jamaica. The advisory body collaborated with the MOH to increase the responsiveness of the Ministry and its agencies to the work of individual volunteers and missions and to streamline the process of engagement with the diaspora. Over 200 medical missions to Jamaica were facilitated during 2013 involving general medical services, ophthalmology, dentistry, heart surgery at the Bustamante Hospital for Children, and a successful kidney transplant at the Cornwall Regional Hospital. In complying with regulations in the delivery of care, there was need for registration, documentation, liaising with professional councils, coordinating with the pharmaceutical division and clearance of medical items among other issues.

FINANCING

The GOJ's budget continued to be the main source of financing for the public health sector. There was little variation in the Total National Expenditure on Heath in relation to Gross Domestic Product (GDP) between 2008 and 2012[1]. Total Health Expenditure (THE) as a percentage of

1 Data for the Jamaica national expenditure on health is available for a five year period 2008–2012

TABLE 23.1a
NATIONAL EXPENDITURE ON HEALTH (J$), 2008-2012

SELECTED INDICATORS	EXPENDITURE RATIO				
	2008	2009	2010	2011	2012
Total Health Expenditure (THE) as a % Gross Domestic Product (GDP)	5.4	5.2	5.3	5.2	5.9
General Government Health Expenditure (GGHE) as % of GDP	2.9	2.9	3.0	2.8	3.3
GGHE as % of THE	53.5	56.1	56.3	53.6	55.7
Private Expenditure on Health (PvtHE) as % of THE	46.5	43.9	43.7	46.4	45.8
Out of Pocket Expenditure as % of THE	33.0	31.2	31.0	32.9	29.4

Source: Ministry of Health

GDP, fluctuated between 5.2 per cent and 5.9 per cent over the period, with the largest recorded proportion in 2012 (Table 23.1). General Government Health Expenditure (GGHE) as a percentage of GDP also fluctuated between 2.8 per cent and 3.3 per cent for the period, with the largest percentage in 2012. GGHE reflected as a percentage of THE moved to 55.7 per cent in 2012 from 53.5 per cent in 2008. Private Expenditure on Heath (PvtHE) as a percentage of THE, fluctuated marginally, ranging between 43.7 per cent and 46.5 per cent. Out-of-Pocket Expenditure as a percentage of THE, had an overall declining trend from 33.0 per cent 2008 to 29.4 in 2012 (see Table 23.1a).

Governments' allocations were supplemented by inputs from non-governmental organizations (NGOs) and International Development Partners (IDPs) including: the United States Agency for International Development (USAID); International Bank for Reconstruction and Development (IBRD) World Bank; United Nations Children's Fund (UNICEF), the Global Fund; United Nations Population Fund (UNFPA); Joint United Nations Programme on HIV/AIDS (UNAIDS); International Development Bank (IDB); EU; and Pan American Health Organization (PAHO)/World Health Organization (WHO).

The Government's budgetary allocation to the sector as presented to the House of Representatives in the Estimates of Expenditures for the Financial Year (FY) 2013/2014 was estimated at approximately $33.9 billion, a decrease of 3.7 per cent compared with the revised estimates for the FY 2012/13 (Table 23.1b). This was due to reduction in allocations to Health Affairs & Services and Departments. Despite the overall decline in the total health budget, there were increases in allocation to Regional and International Cooperation, Disaster Management and Early Childhood Development.

The **Capital A Budget** was estimated at $1.9 billion for FY 2013/14 compared with $610 million in the revised estimates for 2012/2013. Approximately 99.8 per cent ($1.98 billion) of the **Capital A Budget** was allocated to Health Service Delivery for FY 2013/2014 relative to 54.5 per cent allocated for FY 2012/13. This reflected a 45.3 percentage points increase to health service delivery in the 2013/2014 budget (see Table 23.1b). There was no allocation of funds to Health Services Support for FY 2013/14 compared with $4.0 million allocated in the previous year. A significant portion of this Capital A budget was funded by the National Health Fund through an increase in Appropriation in Aid, a total of $1.97 billion moving from $600.0 million in FY 2012/13

There was a decrease of 62.1 per cent in allocation to the Capital **B Budget** compared with $1.61 billion in the previous year (see Table 23.1b). The recurrent budget for health institutions was reduced to $29.7 billion for the FY 2013/14, compared with $29.9 billion in FY 2012/13 (Table 23.1c). Areas of decline were the University Hospital of the West Indies, South East and North East RHAs and the Jamaica/Cuba Eye Care Programme (see Table 23.1c).

PERFORMANCE

Policy and Legislation

During year, the MOH focused on the development and completion of legislation, policies, plans and programmes specifically designed to improving efficiency and effectiveness of the health sector. These included:

- approval of the National Strategic and Action Plan for the Prevention and Control of Non-Communicable Diseases (NCDS) in Jamaica 2013–2018—a road map to reduce the burden and improve prevention and control of non-communicable diseases in Jamaica
- incorporation of the final report on the Sustainable Financing and Reform of the Health Sector into the MOH's Strategic Business Plan to improve the estimates of health accounting for the delivery of effective, efficient and quality of care
- completion of the National Health Information System Strengthening and e-Health Strategic Plan 2014 to 2018 (MOH and PAHO/WHO)
- launch of the National Workplace Policy on HIV/AIDS to strengthen the legal framework for HIV/AIDS as a workplace issue
- preparation for the Implementation Phase of the GOJ Health Card to improve the monitoring of public drugs, and other resources consumed in the island's public health facilities
- completion of the National Food Safety Policy – a collaborative effort between the Ministries of Health and Agriculture
- finalization of the Infant and Young Child Feeding Policy – approved by Cabinet and awaiting tabling in Parliament
- implementation of the WHO Framework Convention on Tobacco Control.

TABLE 23.1b
MINISTRY OF HEALTH AND ITS DEPARTMENTS
RECURRENT AND CAPITAL BUDGETS BY PROGRAMME, 2012/13 - 2013/14
($'000)

FUNCTIONS	REVISED ESTIMATES 2012/13	ESTIMATES 2013/14
RECURRENT		
Social Security and Welfare		
Prevention & Control of Drug Abuse	93 141.0	93 141.0
Total Social Security & Welfare	**93 141.0**	**93 141.0**
Health Affairs & Services		
Executive Direction & Administration	1 335 759.0	1 320 848.0
Training	283 996.0	281 325.0
Regional & International Cooperation	91 000.0	97 000.0
Disaster Management	59 782.0	67 724.0
Early Childhood Development	15 500.0	19 285.0
Health Services Support	663 383.0	661 839.0
Family Planning	107 300.0	106 915.0
Heath Service Delivery	29 959 195.0	29 721 099.0
Total Health Affairs and Services	**32 515 915.0**	**32 276 035.0**
Total Recurrent	**32 609 056.0**	**32 367 180.0**
Less Appropriation in Aid	200 352.0	200 352.0
Net Recurrent	32 408 704.0	32 166 828.0
DEPARTMENTS		
Registrar General's Department and Island Record Office	29 598.0[a]	-
Bellevue Hospital	1 148 647.0	1 117 566.0
Government Chemist	28 925.0	28 408.0
Total Departments	**1 207 170.0**	**1 145 974.0**
Total Ministry of Health and Departments	33 615 874.0	33 312 802.0
CAPITAL A		
Social Security & Welfare Services		
Family Services	-	-
Prevention & Control of Drug Abuse	3 600.0	3 000.0
Total - Social Security & Welfare Services	**3 600.0**	**3 000.0**
Other Social & Community Services		
Disaster Management	270 000.0	-
Total Other Social & Community Services	**270 000.0**	-
Health Affairs & Services		
Health Services Support	4 000.0	
Health Services Delivery	332 400.0	1 987 400.0
Total Health Affairs and Services	**336 400.0**	**1 987 400.0**
Total Capital A	**610 000.0**	**1 990 400.0**
Less Appropriation in Aid	600 000.0	1 970 400.0
Net Capital A	10 000.0	20 000.0
CAPITAL B		
Health Affairs & Services		
Health Services Support	**1 613 035.0**	**614 370.0**
Total Health Affairs and Services		
Total Capital B	**1 613 035.0**	**614 370.0**
Total Capital A & B	**1 623 035.0**	**634 370.0**
Recurrent and Capital	**35 238 909.0**	**33 947 172.0**

a - Less Appropriation

Source: Estimates of Expenditure 2013/14

TABLE 23.1c
MINISTRY OF HEALTH RECURRENT BUDGET
2012/13 and 2013/14
($'000)

HEALTH INSTITUTIONS	REVISED ESTIMATES 2012/13	ESTIMATES 2013/14
South East	11 696 605.0	11 639 465.0
North East	3 766 947.0	3 751 194.0
Western	5 470 326.0	5 483 585.0
Southern	5 031 733.0	5 057 982.0
University Hospital of the West Indies	3 690 971.0	3 486 623.0
St. Joseph's Hospital	239 352.0	239 352.0
Jamaica/Cuba Eye Care Programme	63 261.0	62 898.0
TOTAL	**29 959 195.0**	**29 721 099.0**

Source: Estimates of Expenditure 2013/14

General Health Status

According to PAHO's report on Health in the Americas 2012, life expectancy at birth in Jamaica was 73.1 years with a death rate of 5.0 deaths per 1 000 population[2]. With Jamaicans living longer and low mortality rates, the population will have a greater lifetime exposure to chronic non-communicable diseases[3]. Health seeking behaviour of the population as cited in the latest available ***Jamaica Survey of Living Conditions (JSLC) 2010*** revealed that the largest proportion (56.4 per cent) of respondents visited public health facilities, inclusive of 50.9 per cent who visited public facilities, and 5.5 per cent who went to both private and public facilities. Approximately one in every five Jamaicans (19.5 per cent) had health insurance coverage. Generally, the proportion of insurance coverage increased with wealth and among women. Of the persons without insurance coverage, the majority, 59.7 per cent, sought care at public health facilities while 35.8 per cent visited private facilities only. The ***JSLC 2010*** also reported that of the persons ill/injured 32.4 per cent did not visit the health care provider. Despite the existence of the no user fee policy, 22.3 per cent reported an inability to afford health care visits, indicative of other cost barriers. Some 25.8 per cent of the respondents also reported that they had at least one chronic disease. Over 64.0 per cent of all respondents with diabetes, arthritis and hypertension were females[4]. Preliminary data from the ***JSLC 2012*** revealed that approximately 84.7 per cent of Jamaicans felt their health was generally good. A larger portion of males (86.7 per cent) than females (82.8 per cent) felt they had good or very good health.

The MOH 2013 data revealed that violence-related and other injuries, sickle cell disease and mental health disorders have added to the public health burden in Jamaica. There was a reported 49 009 cases of injuries seen in emergency rooms across the island, 79.3 per cent of Unintentional Injuries (with highest occurrence of Motor Vehicle Accidents, Accidental Lacerations and Falls) and 20.7 per cent Intentional Injuries of which 62.2 per cent were Blunt Injuries. Stab Wounds were over two times more prevalent than Gun Shot wounds (see Table 23.2).

Among the priority issues addressed by the MOH, were the improved management and procurement of pharmaceuticals, a service that was mostly utilized by patients accessing both curative and ambulatory care. This was accomplished through continuous review of the Vital Essential Necessary (VEN) list of approved drugs, with the view of expanding coverage for the treatment of non-communicable and other diseases. As a result 40 drugs not frequently prescribed were delisted, however, 120 new active ingredients were added.

Jamaica made progress in achieving the health-related targets of the MDGs through inter-sectoral collaboration with stakeholders. Partnerships were forged in order to halt the spread and incidences of HIV/AIDS, malaria, tuberculosis (TB) and other diseases. After the local outbreak of malaria during the period 2006–2009, Jamaica was shifted from the category of certified malaria free, to the category of preventing the re-introduction of malaria. After the successful implementation of the Malaria Re-elimination Programme in 2012 Jamaica, regained its status of being on the Official Register of areas where malaria eradication has been achieved.

There was increased access to health care services at the primary care level, fulfilled in part by the Primary Health Care Renewal process. Efforts by the MOH and its partners with funding of over $2 billion supported an improvement in the access to curative care including maternal and child health services at the community level. Four specially selected health centres, referred to as Centres of Excellence (COE) were refurbished. The Health Centres, Santa Cruz (SRHA), Isaac Barrant (SERHA), Claremont (NERHA) and Darliston WRHA, benchmarked a more efficient flexible community-based care with a wider service mix focusing on healthy lifestyles.

Health Status by Age Group

0–9 years

Children in this age group totalled 410 400 and constituted 15.1 per cent of the total population (see chapter on Population). Concerns affecting this age group included Safety (Poisoning, Burns, and Accidental Lacerations), immunization and nutrition. Data from accident and emergency units in public

2 http://www1.paho.org/saludenlasamericas/docs/hia-2012-summary.pdf *retrieved March 31,2014*

3 Sustainable Financing and Reform of the Health Sector to Improve Effectiveness, Efficiency and Quality of Care in Jamaica, 2013

4 PIOJ and STATIN. 2012. *Jamaica Survey of Living Conditions 2010*, Kingston, PIOJ

TABLE 23.2
PATIENTS SEEN IN ACCIDENT & EMERGENCY UNITS OF PUBLIC HOSPITALS BY CONDITION, SEX AND AGE, 2013

Conditions	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	38 884	2 960	2 002	3 306	1 855	5 245	2 609	4 136	2 222	3 965	2 478	3 176	2 471	1 166	1 175
Drowning/near drowning	31	5	4	0	4	3	2	3	1	4	2	3	0	0	0
Burns	1 182	169	133	85	69	96	96	77	69	92	77	80	76	30	28
Poisoning	784	202	172	48	34	27	46	41	30	39	53	31	32	18	8
Motor Vehicle Accidents	8 169	136	87	247	191	890	619	1 561	699	1 359	717	864	460	201	107
Accidental Lacerations	10 517	747	429	1 169	534	1 704	551	1 307	482	1 280	489	948	480	245	116
Bites	4 758	299	157	376	255	533	426	376	391	441	430	402	432	122	110
Falls	13 443	1 402	1 020	1 381	768	1 992	869	771	550	750	710	848	991	550	806
Intentional Injuries	10 125	114	118	268	198	1 246	1 532	1 442	1 167	1 453	913	945	421	190	84
Attempted Suicides	242	0	0	0	0	20	80	25	35	12	42	10	9	3	4
Stab Wounds	1 758	1	2	13	3	303	113	464	136	421	102	148	31	15	1
Gun Shot	600	1	1	6	4	44	6	187	16	180	27	97	14	14	1
Blunt Injury	6 300	108	68	229	123	849	558	762	812	839	671	690	338	158	76
Sexual Assault	1 225	4	47	20	68	30	775	4	168	1	71	0	29	0	6

Note: Data is provisional and was only available for the period January - September, 2013
Unknown ages were included in the total cases seen.
Statistics for Kingston Public Hospitalnot available

Source: Ministry of Health

hospitals reported that 10 821 children suffered from Unintentional and Intentional Injuries. The main reasons for visits to the accident and emergency unit were, Falls (4 571), Accidental Lacerations (2 879), Bites (1 087), Motor Vehicle Accidents (661), Blunt Injuries (528) as well as Burns and Poisoning, both accounting for 456 of the cases, respectively (see Table 23.2).

Preliminary data from the MOH indicated that immunization coverage for children 0–11 months for the period January–September, 2013 was 91.9 per cent compared with 95.0 per cent for the corresponding period of 2012. Expected coverage for each antigen (vaccines) was 95.0 –100.0 per cent in all RHAs. The highest coverage was the MMR vaccine at 94.0 per cent, all other vaccinations reflected over 90.0 per cent coverage except for OPV at 86.0 per cent (Table 23.3). The Polio (OPV) coverage (91.0 per cent in 2012) was lower due to shipment damage to vials containing the vaccines; this resulted in the depletion of the stocks by June 2013. Emergency intervention within health departments included line listing of all infants who missed polio vaccination. Rigorous efforts were then made through a strategy of home visits to ensure full vaccination of that birth cohort. Throughout the island no cases of measles, rubella, polio or neonatal tetanus were diagnosed in 2013.

Provisional data from the MOH showed that 44.7 per cent of the six weeks old babies seen at the six-week public clinics between January and September 2013 were exclusively breast-fed compared with 49.7 per cent in 2012. This was below the MOH target of 60.0 per cent exclusive breast-feeding at six weeks under the MOH Baby-Friendly Hospital Initiative. The Baby-Friendly Hospital Initiative[5] is a continuing collaborative effort by the MOH, UNICEF and PAHO/WHO to ensure that maternity hospitals become breast-feeding support centres. Exclusive breast-feeding at three months was also reported below the Ministry's target, a reported 23.4 per cent in 2013 compared with 32.0 per cent in 2012. This initiative was strengthened through the training of 800 health care workers on breast feeding support in hospitals. Additionally, 50 decision-makers also received training in strengthening and sustaining the initiative.

10–19 years

The 10–19 age group totalled 515 100 and constituted 19.0 per cent of the total population (see chapter on Population). Motor vehicle accidents, violence, reproductive and mental health were some of the key issues affecting this group.

Injuries were prevalent among this age group. The occurrence of Intentional and Unintentional Injuries was higher among males (61.1 per cent) than females within this age group (see Table 23.2). Data in the public hospitals revealed that this age group accounted for 21.7 per cent of all injuries seen between January and September 2013. Incidence of Falls (21.3 per cent), Accidental Lacerations (21.4 per cent) and Motor Vehicle Accidents (18.5 per cent) were more prevalent among males. Adolescents accounted for 65.7 per cent of all cases of Sexual Assaults seen in public hospitals. The reported 100 cases of Attempted Suicide was 41.3 per cent of all cases attending public hospitals. Of the 100 cases in this 10–19 age group, 80 of them were females. Globally, studies have shown suicide among the leading cause of death among 15–19 years old[6]. Combined efforts between the MOH, Ministry of Education (MOE), Ministry of Youth and Culture (MOYC), UNICEF and the EU established a programme of reducing the juvenile population in state-run institutions. A major focus was placed on rehabilitative efforts to reintegrate youths in families,

5 http://www.unicef.org/programme/breastfeeding/baby.htm

6 http://www.cdc.gov/violenceprevention/youthviolence/stats_at-a_glance/lcd_15-19.html

TABLE 23.3
IMMUNIZATION COVERAGE, 2009-2013
(PER CENT)

YEAR	BCG	OPV	DPT+DT	MMR	Hepatitis B	Heamo B
2009	94.1	90.0	90.1	88.0	90.0	90.0
2010	101.3	100.0	100.2	95.0	100.1	100.1
2011	98.0	92.3	91.4	86.5	91.5	91.4
2012	87.0	91.0	91.0	80.0	91.0	91.0
2013[p]	92.7	86.0	93.1	94.0	92.8	93.1

Note: Data for January – September, 2013
p - provisional

Source: Ministry of Health

schools and homes (see chapter on Social Development, Welfare and Culture). A psycho-social tool developed by the MOH, is being used for assessment of minors in lockups or remand centres.

The World Bank Reproductive Health Action Plan 2010–2015, states that a well organised sustainable health system should be capable of responding to the health needs of women, children and families. Global best practice cited the Adolescent Mothers' Programme of the Women's Centre of Jamaica Foundation as a centrepiece of a 'good practice'. The programme provides continuing education, counselling and practical skills training to mothers under the age of 17 years as a move to reintegrate them into the education system and back on their career paths[7]. There was a deficit, however, in the provision of reproductive health services to adolescents because of the existing legal frameworks. The MOH, in collaboration with the Ministry of National Security and the Ministry of Justice, conducted high level stakeholder consultations and is in the process of revising the Sexual Offences Act (2009) and the Age of Majority Act (2009) in the best interest of the child (see chapter on Population).

In empowering adolescents and youth to take responsibility and reduce sexual risk-taking behaviour, 40 students were reached through a psycho-education support group; 101 adolescents/youth were also reached through rap sessions with messages aimed at reducing risky sexual behaviours; and an Information Communication and Technology (ICT) platform was developed to expand access to SRH information to out-of-school youth and 8 facilitators were trained in support of this platform. A comic book was also developed for adolescents 10–14 years with information surrounding thematic areas of nutrition, drug use, sexual and reproductive, and mental health.

20–64 years

The group totalled 1 559 300, and constituted 57.4 per cent of the population (see chapter on Population). Motor vehicle accidents, violence related injuries, injuries from falls and chronic non-communicable diseases mainly affect this group. Approximately one-half of the patients seeking care within emergency units in public hospitals were among this age group. Some 69.3 per cent of patients in this age group were involved in Motor Vehicle Accidents, 65.3 per cent in cases with Blunt Injuries and 47.4 per cent of cases with Accidental Lacerations (see Table 23.2). Persons in the 20_44 years age group accounted for 68.3 per cent of cases of Gun Shot wounds with the majority (61.2 per cent) being males.

65 years and over

There were 233 200 persons in this age group, representing 8.6 per cent of the population (see chapter on Population). Chronic diseases and unintentional injuries were the key issues affecting this age group. Data were from the public health centres between January and August 2013 showed a total of 963 persons being newly diagnosed with Diabetes and Hypertension. There were 212 and 751 newly diagnosed cases of Diabetes and Hypertension, respectively. Females accounted for 63.7 per cent of new diabetics; however, there was not much difference between the males and female newly diagnosed with Hypertension.

The 65 years and over age group accounted for approximately 5.3 per cent of the persons who accessed emergency care in public hospitals. This age group accounted for some 6.0 per cent of cases of Unintentional Injuries, mainly from Motor Vehicle Accidents (308), Accidental Lacerations (361) and Falls (1 356). Prevalence of Unintentional Injuries was generally higher among males. The majority of the Lacerations 67.9 per cent were among males while females accounted for the majority of Falls (59.4 per cent). Other injury-related illness for which they sought care included Blunt Injuries which accounted for 3.7 per cent of all intentional blunt injuries of which the majority (67.5 per cent) was males (see Table 23.2).

Health Service Delivery

Health service delivery within the public sector was accomplished through a network of primary, secondary and tertiary health care facilities comprising 24 hospitals (including UHWI) and 317 health centres, geographically distributed across four RHAs (Table 23.4). Primary health care was delivered within public health centres classified as Types 1–5, according to services offered and population served within specific geographical borders. These deliver mainly curative services. The number of health centres increased as a new primary care facility was refurbished and reopened in the SERHA. Secondary services refer to all hospitals classified as Types A, B and C according to bed capacity and services including all specialist hospitals namely: The Bustamante Hospital for Children; Victoria Jubilee; Bellevue; National Chest; Hope Institute; and Sir John Golding Rehabilitation Centre. Three institutions continued to deliver tertiary level services, namely Kingston Public Hospital (KPH), Cornwall Regional Hospital (CRH) and University Hospital of the West

7 UNFPA State of The World Population Report 2013: Motherhood in Childhood, Facing the Challenge of Adolescent Pregnancy

TABLE 23.4
NETWORK OF SERVICE DELIVERY FACILITIES, 2013

REGIONAL HEALTH AUTHORITIES	PARISHES	FACILITIES		POPULATION	TOTAL ADMISSIONS	TOTAL DISCHARGES (Including deaths)
		Health Centres	Hospitals			
South East	Kingston, St. Andrew, St. Thomas, St. Catherine	90	10	1 281 800	58 355	57 958
North East	Portland, St. Mary, St. Ann	74	4	370 600	21 555	21 478
Western	Trelawny, St. James, Hanover, Westmoreland	80	4	476 000	24 758	24 736
Southern	St. Elizabeth, Manchester, Clarendon	73	5	589 600	24 626	24 970
TOTAL		**317**	**24**	**2 718 000**	**129 294**	**129 142**

Note: Admission and Discharges are for the period January - September 2013
End of year population figures are used

Source: Ministry of Health and the Statistical Institute of Jamaica

Indies (UHWI)[8]. Both primary and secondary facilities throughout the island operated as training institutions for health professionals in undergraduate and post graduate programmes and facilitated research from a multiplicity of areas, which contributed to quality of care and evidence-based practice. SERHA, the largest region, with responsibility for 47.2 per cent of the population, attended to 58 355 patients during the year (Table 23.4). This total represents 45.1 per cent of all clients, one–third of whom were admitted to the KPH. The UHWI attended to 12 399 patients.

In addressing health service delivery, the 2013 staff complements of the MOH and the RHAs was 12 874 relative to 14 606 in 2012. This forms 97.0 per cent of the projected 13 003 staff that can effectively manage the health system 2014/2015. The Health and social worker Industry registered a 15.3 per cent increase in employment during the year (see chapter Labour Market). According to WHO, Human Resource for Health (HRH) is identified as one of the building blocks to an efficient health system[9]. Jamaica's second assessment of the PAHO/WHO Regional goals for Human Resource for Health, reported that the ratio of nurses to physicians was 1:1.2. This ratio, however, declined compared with the 2010 ratio of 2.3 nurses to each physician. A human resource for health unit was established within the MOH to inform policies in human resource while adapting to workforce challenges in the health sector. Activities in HRH planning by the MOH were geared towards a Chronic Care Model approach with a primary health care focus.

e-Health

In keeping with the trend of widespread computerization of health records and other information in addition to recommendations from WHO in its Health Metrics Framework and Standards, the MOH progressed in its efforts to strengthen the National Health Information System. Twelve persons received training in Health Information Management in preparation for the implementation of the National Health Information Systems Strengthening and e-Health Strategic Plan for 2014–2018. The Plan was developed through consultation with multi stakeholder groups and organised around strategic objectives geared towards:

- strengthening national and organizational capacity for health information
- ensuring required framework is in place to enable effective and appropriate use of information and technology to improve the quality of health information.

Record keeping was also improved through the MOH's update of the Health Records Procedure Manual which was further reviewed by record keepers within health facilities. In an effort to improve the quality of mortality and morbidity coding, a training session was conducted for 20 persons consisting of coders and medical record keepers at public hospitals, clinics, and areas of medical data classification. This ICD–10[10] mortality coding training was facilitated by the Caribbean Public Health Agency (CARPHA).

Primary Health Care

There was increased focus on community involvement through the MOH's strategic policy priority 'to ensure access to health care services'. This was achieved through the development of a programme of primary health care renewal based on national epidemiological and demographic profiles. To facilitate this process, over 80 health centres islandwide were refurbished and equipped to provide optimal service in keeping with the needs of their respective communities. Among these were the upgrade and expansion of the four Centres of Excellence. Through Capital A Appropriations in Aid from the National Health Fund's revenue of over $415 million dollars ($100 million Phase 1, and $315 million Phase 2) the following upgrades were made:

8 Health care institutions classified as' teritiary' are Type A hospitals and facilitates training

9 World Health Organization. *The World Health Report 2006: Working Together for Health*, Geneva, 2006 – http://www.who.int/whr/2006

10 International Classification of Diseases, Tenth version (ICD–10) is a medical classification of diseases that was developed by the WHO.

TABLE 23.5
CURATIVE VISITS TO PRIMARY HEALTH CARE FACILITIES BY LEADING CONDITIONS AND REGION, PUBLIC HEALTH SECTOR, 2013

DIAGNOSIS	South East	North East	Western	Southern	Jamaica	
	No. Visits	No. Visits	No. Visits	No. Visits	No. Visits	% of top 6 visits
Hypertension	54 734	22 671	27 887	30 055	135 347	27.3
Diseases of the Respiratory Tract	56 074	11 788	23 369	11 971	92 304	18.6
Genito- Urinary Diseases (including STD)	59 392	14 759	13 877	11 117	99 145	20.0
Skin Disease	38 760	13 412	12 000	9 873	74 045	15.0
Musculoskeletal	22 127	10 774	11 082	11 350	55 333	11.2
Psychiatry	19 141	6 056	7 312	6 524	39 033	7.9
TOTAL	**250 228**	**79 460**	**95 527**	**80 890**	**495 207**	**100.0**

Note: Data is provisional and was only available for the period January - August 2013

Source: Ministry of Health

- **Santa Cruz Health Centre** – Phase 1 was completed and officially opened November 2013. This included: (i) modification and expansion to the dental area; (ii) construction of a new Maternal and Child Health area; and (iii) an expansion of the building to create a laboratory.
- **Darliston Health Centre** – Phase 1 was completed in August 2013 and opened 21st December 2013. This phase included infrastructural improvements of three office spaces for Environmental Health, Maternal and Child Services, and other infrastructural work, and lengthening access time to the services.
- **Isaac Barrant Health Centre** – included infrastructural work in the following: dental, curative, medical records and laboratory.
- **Claremont Health Centre** – included expanding the old building and construction of a new building to include a laboratory, pharmacy, counselling room, staff lounge and public bathroom facility.

Total visits to health centres islandwide for the period January–August 2013 was 1 062 267[11]. More females (773 698) than males (288 569) visited the health centres for care. Of the total, curative visits accounted for 495 207 of the cases seen, the leading six causes remained unchanged: Hypertension (27.3 per cent); Genito-Urinary Diseases (including STD) {20.0 per cent}; and respiratory diseases (18.6 per cent) {Table 23.5}. Hypertension was the main reason for visits nationally and across the RHAs (135 347). Approximately one-fifth of the patients sought care for genitourinary infections including cases that were due to sexually transmitted infections, the second highest occurrence.

The continuous systematic collection and analysis of health-related data continued throughout the year and served as an early warning for impending public health emergencies and informed public health strategies. The National Surveillance Unit focused on improving reporting practices from public and private physicians through repetitive detailed feedback from the technical curative surveillance officers. Active surveillance resulted in 34 outbreaks, 4 of which were clinically confirmed and testing was not indicated.

Secondary and Tertiary Health Care

Admissions to secondary care facilities inclusive of government hospitals and the UHWI totalled 141 693 during the period January – September 2013, a 1.4 per cent decrease compared with the previous period. Type A hospitals continue to account for the highest overall admissions, 48 024 (33.9 per cent) because of the extensive services offered, while the lowest admissions were in specialist hospitals 22 179 (15.7 per cent) {Figure 23A}. The Kingston Public Hospital, received referrals from all hospitals islandwide and admitted 20 236 patients the highest overall, followed by Cornwall Regional

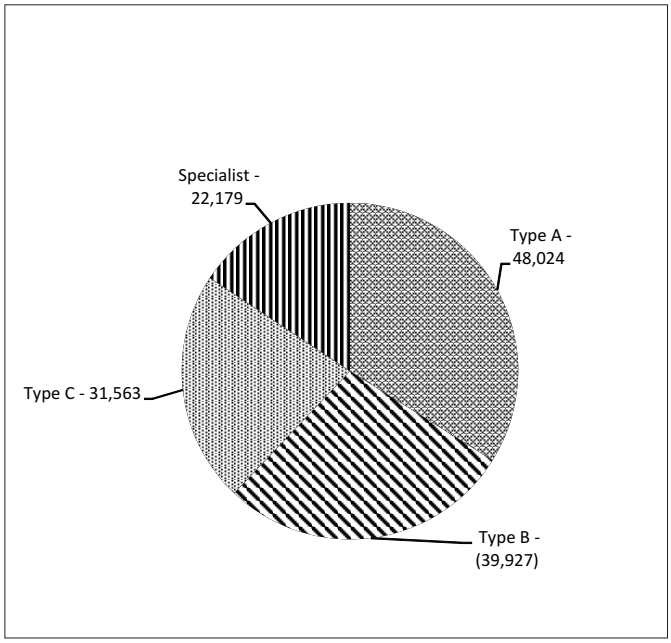

FIGURE 23A: TOTAL ADMISSIONS BY HOSPITAL TYPES, 2013

11 Data on primary health care services were available for the period January to August 2013.

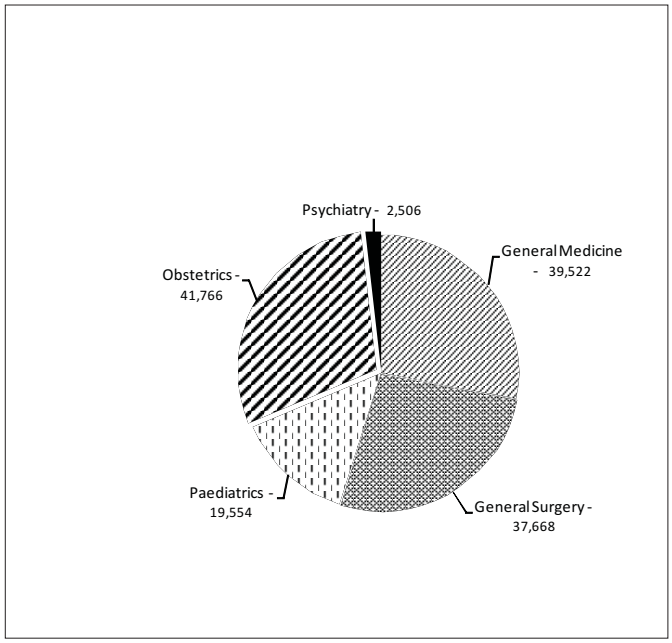

FIGURE 23B: TOTAL ADMISSIONS BY SPECIALITY

Hospital with 15 389 admissions and UHWI with 12 399 admissions.

There was 72.8 per cent bed occupancy reported, with a mean bed complement of 4 746 (a decrease of 5.1 per cent relative to the corresponding period the previous year). Average length of stay in hospitals was 5.6 days up from 5.0 days in the previous period. There were 141 764 in-patient discharges compared with 200 945 in the previous period and an increased death rate of 44.2 per 1 000 discharges compared with 41.2 in the corresponding period (Table 23.6). Data for five main clinical specialities, namely: General Medicine (39 522); General Surgery (37 668); Paediatrics (19 554); Obstetrics (41 766 cases) and Psychiatry (2 506 cases) {Figure 23B}. General Surgery accounted for the highest number of cases (41 480) in the previous year.

Mental Health

Mental health related visits were among the top five reasons for visits to curative health facilities. A total of 39 033 clients with psychiatric illnesses visited the health centres (see Table 23.5) and 2 506 were admitted to hospital. Mental health was given priority for human resource training and policy development. Quality assurance initiatives were designed to improve community health services in response to the mentally-ill clients. Included was a final draft of the protocol to guide care, in restraints used in mental health, and a trainer of trainer workshop organized for Community Mental Health Workers on the Human Rights of Mentally-ill persons. These include the right to better, more accessible care and the right to be reintegrated into society. In an effort to strengthen the effectiveness of mental health legislation, the MOH and PAHO/WHO collaboration facilitated the completion of the National Mental Health Policy and Strategic Plan.

Child and Adolescent Mental Health

The protocol for the Management of Common Mental Health Disorders continued to guide the care for children and adolescents under specific modules. The modules address improvement of services to children diagnosed with mental depression and anxiety disorders among others. Due to hormonal changes, adolescents are more prone to depression; studies show that major depression affects 2.0 per cent – 3.0 per cent of children and adolescents and may lead to suicide[12]. Of the 242 cases of Attempted Suicide seen in ambulatory care, the highest occurrence, 41.3 per cent was seen among adolescents 10-19 years (see Table 23.2).The total number of visits to the Child Guidance clinics in public health facilities and UHWI for January – September 2013 was 2 529 relative to 5 338 in the previous period. Approximately 21.0 per cent were new cases in 2013 compared with 25.0 per cent in the corresponding period. The number of visits to Child Guidance clinics decreased in all regions. The largest proportion (37.1 per cent) of the visits was from UHWI and 17.0 per cent from SRHA.

TABLE 23.6
INDICATORS OF UTILIZATION OF ACUTE SECONDARY CARE FACILITIES IN THE PUBLIC HEALTH SECTOR, 2011-2013

INDICATOR	2011 r	2012 r	2013 p
Mean Bed Complement	5 211	5 001	4 746
In-patient Discharges	195 156	200 945	141 764
Bed Occupancy (%)	61.9	67.8	72.8
Average Length of Stay (days)	5.8	5.0	5.6
Annual Turnover Rate (mean %)	37.0	39.7	29.5
Death Rate Per 1 000 Discharges	40.6	41.2	44.2
Deliveries	38 098	38 049	26 389
Out-Patient Visits	628 563	664 084	505 094
Casualty Attendance	749 036	776 464	516 041
Pharmacy (patients seen)	905 476	906 464	635 087
Pharmacy (items dispensed)	2 261 844	2 452 210	1 781 494

Note: Death rate calculated per 1 000 discharges
p - Provisional figures for the period January - September 2013
r - Revised: January - September.

Source: Ministry of Health

12 Childhood and Adolescent Depression SHASHI K. BHATIA, M.D., and SUBHASH C. BHATIA, M.D., Creighton University, Department of Psychiatry, Omaha, Nebraska Am Fam Physician. 2007 Jan 1;75(1):73-80.

TABLE 23.7
PHARMACY SERVICES AT PUBLIC HEALTH CENTRES
BY REGION AND PARISH, 2013

REGION/PARISH	Number of Patients	Items Prescribed	Items Dispensed	No. of Items Out of Stock
TOTAL JAMAICA	**212 410**	**726 295**	**535 924**	**138 367**
SOUTH EAST	67 228	244 644	174 866	49 553
Kingston & St. Andrew	57 281	209 740	150 973	38 539
St. Thomas [a]	0	0	0	0
St. Catherine	9 947	34 904	23 893	11 014
NORTH EAST	58 434	189 720	137 148	45 356
Portland	21 962	62 207	47 151	14 411
St. Mary	5 634	20 355	15 926	195
St. Ann	30 838	107 158	74 071	30 750
WESTERN	41 597	150 134	117 220	11 986
Trelawny	16 413	58 575	45 137	11 897
St. James	25 184	91 559	72 083	89
Hanover [a]	0	0	0	0
Westmoreland [a]	0	0	0	0
SOUTHERN	45 151	141 797	106 690	31 472
St. Elizabeth	2 535	11 708	7 552	1 167
Manchester	29 899	84 080	63 648	19 785
Clarendon	12 717	46 009	35 490	10 520

Note: Data is provisional and was only available for the period January - August 2013
a - Data unavailable for these parishes

Source: Ministry of Health

There was a strategic move by the GOJ to introduce a programme to Reduce the Juvenile Population in State Run Institutions in Jamaica (RJPSI). This action was a joined up government approach[13] supported by the EU and UNICEF to improve government's capacity to care for the juveniles. The programme addressed a non-custodial approach to rehabilitation with emphasis on good mental health, empowerment and re-integration. In strengthening the response to the needs of children in residential child care facilities, planned outputs of the project included:

- Mobile Mental Health Service—Smiles Mobile—for children in state-supported institutions.The retrofitted mobile health unit was designed to provide diagnosis and treatment for physically, emotionally and sexually abused children, and to assist in psychological challenges, rehabilitating and reintegrating of families
- National Child Diversion Programme (NCPD)–considerable work was done in development of the draft Child Diversion Policy. Special emphasis was placed on the rehabilitation and reintegration programmes through orders given by the courts of Jamaica.

Performance on the Health-Related Millennium Development Goals

The GOJ continued its efforts to achieve the health-related MDGs in reducing child mortality rates (MDG 4), improving maternal health (MDG 5) and combating HIV/AIDS malaria and other major diseases (MDG 6) through improvement in the skilled workforce, infrastructure, disease surveillance and mitigation.

Maternal and Child Health[14]

Maternal and Child mortality continued to pose a challenge. Specific attention was given to MDG Goals 4 and 5 which were lagging. Accelerated efforts to achieve the goals included: i) improve access to maternal services through upgrade of four health centres into Centres of Excellence to meet maternal and child health demands within communities, and ii) preparatory activities under the Programme for the Reduction of Maternal and Child Mortality (PROMAC).

The MOH placed priority on initiatives relating to the reduction of maternal and child mortality through the EU funded project, PROMAC. The objective of this programme is to attain MDG 4 of a 75.0 per cent reduction in child mortality rate by 2015 and to provide evidence through research on the causes of prematurity, and improve maternal health. There

13 Ministry of Youth and Culture/Child Development Agency, the Ministry of Health/Child and Adolescent Mental Health, the Ministry of Justice and the Ministry of National Security/Department of Correctional Services

14 Represents provisional data from MOH for the period January –September 2013

were on-going stakeholder meetings with EU, the University of the West Indies (UWI) and the MOH that facilitated development of a proposed training programme for specialist doctors, nurses and nutritionists, and cost assessment estimates for Phase 1 of the project (see chapter on Official Development Assistance). Other interventions in maternal care included partnership with Clinton Health Access Initiative (CHAI) and the SERHA for the upgrade of laboratory equipment at the Victoria Jubilee Hospital to improve maternal HIV testing turnaround times.

Over the period January–September 2013, the MOH reported 28 666 cases of successful maternal deliveries. In the public health sector 79.9 per cent represented natural child birth, 20.1 per cent Caesarean section (c-section)[15] cases. Complications of pregnancy included Postpartum Haemorrhage, which accounted for 934 cases, and 44 of the women suffered from Pre-Eclampsia. The MOH reported 17 Maternal Deaths[16] within public hospitals for this period.

HIV/AIDS

Nationally, there were approximately 32 000 persons between the ages of 15 and 49 years, living with HIV/AIDS[17]. The framework for HIV/AIDS response was guided by the National HIV Strategic Plan which focused on prevention, treatment, care and support, enabling environment, empowerment and governance. A substantial portion of funding for the HIV response was supported through agreements with donor agencies such as Global Fund, United States Agency for International Development (USAID) and the World Bank.

During 2013, the World Bank's US$40.0 million (2008–2013) funding for a major project through the National HIV/AIDS Programme expired. Initiatives for the period included procurement of HIV testing supplies resulting in over three million tests conducted between 2008–2013. Infrastructural improvement through this funding was completed at a new treatment site in Portland; a clinic for the incarcerated population; the Biomedical Waste Management Plant in the western region; and the National Public Health and Tuberculosis Laboratory. Over the period, there was also procurement of alternative nutrition for new-borns of HIV infected mothers as well as nutritional supplements to promote antiretroviral (ARV) medication adherence. During the year, there were discussions surrounding the issue of maintenance and sustainability of the HIV/AIDS response. The high debt to GDP ratio and the official World Bank classification of Jamaica as an upper middle income country restricted the country's capacity to support programmes comprehensively as well as limit the eligibility for further funding. Various research and recommendations continued to inform the scope of resources needed to sustain the HIV/AIDS response including the Financial Sustainability Study, National AIDS Spending Assessment, and Assessment of the Resource Gap.

Through advocacy from the Government, the Global Fund strategies to combat the spread of HIV/AIDS continued through institutionalization of prevention initiatives islandwide. To avert the economic constraints on HIV/AIDS related services, the MOH leveraged existing resources by combining services. In April 2013, aspects of the HIV programme (Prevention, Enabling Environment and Human Rights and Empowerment and Governance) were integrated into the services of the National Family Planning Board (NFPB) and rebranded NFPB–Sexual Health Authority (see chapter on Population).

Stigma on the lives of persons living with HIV in Jamaica was reflected in a report of the Persons Living with HIV Stigma Index survey completed in 2013. Much emphasis was also placed on reducing discrimination within workplaces, and empowerment of this key population through education and training. The Government, trade unions, and employers launched the National Workplace Policy on HIV/AIDS in December 2013. The policy intends to strengthen the legal framework for HIV/AIDS as a workplace issue. The initiative began in 2002 and utilized the 10 principles provided by the International Labour Organization (ILO) in the Code of Practice on HIV /AIDS and the World of Work**.** The Policy will facilitate the development of a working environment that seeks to:

- protect the rights of workers who are infected, by ensuring that workplaces develop a framework for action
- highlight the rights and responsibilities of workers
- articulate the usefulness of education, training, counselling, workplace based research prevention and support programmes
- strengthen the capabilities of organizations to contribute to the reduction of HIV/AIDS related stigma and discrimination by raising awareness of the disease.

A national standard prevention strategy was fully institutionalised across all regions targeting the most at risk populations (MARPs) including sex workers (SW) and men who have sex with men (MSM). Established services included: voluntary counselling and testing (VCT); risk reduction counselling; building self-efficacy; condom and lubricant distribution; and referral for follow-up care. Over the period, 1 000 inmates benefited from VCT. Linkages established by private sector and social agencies under the programme for the Empowerment of Key Populations facilitated contacts with 8 015 SWs and 3 285 MSM. As a result, some 20 female SWs and 21 MSM were enrolled in HEART certified training courses; 19 mentees were enrolled in schools which boasted successful passes in Caribbean Secondary Education Certificate (CSEC) Mathematics and English Language, and others received assistance with income generating projects. The mentorship programme is continuing with 36 out of school youth recruited from vulnerable communities.

Health Promotion and Education

A primary focus of the MOH was prevention of diseases through a country strategic community based approach. The health system supported the health promotion intervention aspect of the Community Renewal Programme (CRP). The overall goal of the programme was having cleaner and more habitable environments, better sanitation and better public and individual infrastructure. A health needs analysis of targeted communities was done through an online survey.

15 Delivery of an infant through surgical incision in the mothers abdomen and uterus

16 Maternal death is death of a woman while pregnant or within 42 days after the termination of pregnancy. Standard Definitions of Vital Statistics and Vital Events and Standards for calculations of Vital Statistics, Vital Statistics Commission 2010.

17 UNGASS Country Progress Report, Jamaica 2012.

From the findings, a Community Health Baseline Data Framework was developed for 100 communities. The CRP in partnership with the MOH, through the KSA Health Department, launched its first health promotion activity, a health fair, in the Seaview Gardens community. Health checks were given to over 150 community members with hypertension and over 70 with diabetes. Approximately 170 persons were referred for follow up care in the health centres (see chapter on National Security and Justice). A Technical Working Group was convened to give oversight to the implementation of an Environmental Health Foundation project 'renewing Majesty Gardens through proper Parenting, Nutrition, Climate Change Adaptation and Waste Management'. The MOH and Public Health Department contributed to development of the operational plan to address parenting and nutritional issues within the community.

Health promotional activities included population-wide physical activity as part of the management for overall healthy lifestyles. Activities for this initiative were limited due to inadequate funding for equipment and human resources. To support the interventions, funds were garnered from the NHF. Despite the challenges, considerable progress was made and several activities were implemented including:

- capacity building workshops for health care workers enabling staff to develop physical activity programmes and training resource manuals to be utilized in each parish
- partnership with physical activity experts as part of the overall healthy lifestyle initiative
- capacity building was done in areas of the Lay Diabetes Programme (307 Trainers and educators trained in 2012). The overall goal of the programme was to determine integration of the skill set received in 2012 into their regular work portfolio

collaboration with colleges and universities to solicit greater support for physical activity intervention in parishes. As a result, 10 Mico University practicing educators and five teachers from the GC Foster College of Physical Education and Sports, were placed in eight Health Centres, using the Activity Base Resource Guide to assist health care workers in the promotion of physical activities. This was supported by capacity building workshops to strengthen physical activities in the parish. A physical activity media campaign was also developed and tenders submitted for procurement approval.

Chronic Diseases

Over the past 10 years, chronic non-communicable diseases such as diabetes, hypertension, cardiovascular diseases and obesity have become major causes of illness and death in Jamaica[18]. During the year, hypertension accounted for the highest number of curative visits 135 347 (27.3 per cent) {Table 23.5}. In continuation of efforts to improve prevention and control strategies, and mitigate the impact of non-communicable disease burden in Jamaica, the MOH developed a five-year multi-sectoral National Strategic and Action Plan for the Prevention and Control of Non-Communicable Diseases (2013–2018). The Plan builds on existing programmes and purports strategic objectives that address: i) risk reduction and health promotion; ii) management of the diseases; iii) improvement of disease surveillance; iv) policy development; v) advocacy; vi) governance; and vii) capacity building. A cost assessment was undertaken to determine the cost for implementation of the National Plan. With funding assistance from the Heart Foundation of Jamaica, empowerment prevention programmes were directed towards faith-based organizations through a national consultation.

Jamaica became party to the WHO Framework Convention on Tobacco Control by passing the Public Health (Tobacco Control) Regulation, July 2013[19] symbolically marking the fact that over six million persons worldwide die annually from the effects of tobacco smoke, 10.0 per cent of these persons were non-smokers and victims of second-hand smoking. The law being the primary piece of regulation to govern tobacco control in Jamaica outlined three main parameters concerning:

- Smoke free spaces – a comprehensive ban on smoking indoor public places with special exceptions for hotel rooms
- Tobacco Advertising, Promotion and Sponsorship – the law pertains to the means of advertising such as the ban on tobacco advertising on local television and radio and outdoor branding
- Tobacco Packaging and Labelling – 75.0 per cent of the principal display areas on the packaged goods (unit and outside packaging) should contain health warnings.

The Smoking Ban Indoor Public Spaces Policy became effective July 15, 2013. Regulations stipulated that no smoking should take place within five metres of the entrance or exit of a public place and its ventilation system. Examples of these public spaces include:

- all places accessible to the public
- public transportation
- work places
- government owned and occupied buildings
- health facilities including pharmacies
- sports and recreational facilities
- educational institutions
- areas for use by children
- places of collective use such as bus stops.

To support the implementation of the regulations, a social marketing campaign was initiated. The campaign included tobacco control capacity building and sensitization workshops with Health Professionals, regional environmental health officers, health promotions officers and chronic disease coordinators.

Cancer Care

Within the non-communicable disease burden in Jamaica, cancer is the fourth leading cause of death among males, and fifth among females. Annually, Jamaica's prevalence for cervical cancer and breast cancer has an estimated incidence rate, and mortality rate of 31.2 and 12.1 per 100 000 population,

18 PIOJ and STATIN. 2012. *Jamaica Survey of Living Conditions 2010*, Kingston PIOJ

19 http://www.tobaccocontrollaws.org/legislation/country/jamaica/summary

respectively. Against this background, the MOH continued its efforts to reduce the incidence and prevalence of cancers through the formulation of a National Strategy and Action Plan for the Prevention and Control of Cancer, directed by a National Cancer Technical Working Group. The Plan was informed with data from a comprehensive review of the national cancer programme by the International Agency for Atomic Energy. The main tenets of the plan related to a comprehensive assessment of the country's cancer control and planning, cancer information on early detection, diagnosis and treatment, palliative care and training. Workforce capacity building exercises supported mainly by the PAHO were given to medical physicists and inspectors in radiation safety established at The University of the West Indies (didactic only); employees of the Hope Institute on Palliative Care; pathologists in the use of additional biomedical equipment and to conduct visual inspection of acetic acid along with the social media campaign against tobacco use in public spaces.

In enabling the health professionals to understand and address the cancer burden more effectively, the MOH commenced preparation for the roll-out of the National Cancer Registry in March 2013 with implementation by the SERHA and NERHA. The National Cancer Registry training was held across all the RHAs with some 200 participants including: Regional Epidemiologists; Systems Network Administrators; Regional Technical Directors; Parish Managers; Regional Surveillance Officers; SMOs of major hospitals; Directors of Nursing Services at major hospitals; managers of private diagnostic and treatment centres; and medical laboratory managers. The registry contains information on the types, extent and location of the cancer among other biographical data, incidence and prevalence of cancer among the Jamaican population.

Oral/Dental Health

The World Oral Health Day highlighted the importance of 'Healthy Teeth for a Healthy Life' referring to the significant role it plays in general health and individual self-confidence[20]. The MOH brought into sharp focus the oral health of patients within the mental health institutions. In an effort to improve the oral health programme nationally, an investment of $1.5 million by the MOH afforded placement of a dental unit within the Bellevue Hospital. Full service was made available to patients and staff.

The oral health services were strengthened through sensitization programmes regarding improvement of physical plants within the RHAs. A number of needs were identified including infrastructural repairs and urgent supplies. Interventions included a new dental health clinic established in the Christiana Health Centre, and infrastructural repairs to the physical plants at Porus and Chapelton Health Centres.

A key strategy was monitoring of oral health service over the period. A standardize Audit Instrument was developed and used to conduct monitoring visits and measure the desired impact of dental health services islandwide. This instrument informed the non-conformance report and was fed to the Public Health Department to guide the provision of infrastructural equipment and supplies. Stakeholder reviews were conducted to determine ways of improving the instrument as needed to ensure attainment of the desired impact.

Nutrition

Progress was made on the finalization and implementation of the Food-Based Dietary Guidelines which formed the nutrition component of an Inter-American Development Bank funded project on Social Protection Support to the Food Price Crisis (SPSFPC). Plans to validate the feasibility of the recommendations were implemented through the use of a pretested food recall questionnaire among 240 households identified by STATIN, and training of dieticians on the guidelines for testing household nutrition.

The MOH contributed to health promotion and prevention of chronic disease in school with support in developing the nutrition component of the Health Promoting School Policy. Among the capacity building exercises were specific sessions with school administrations. Further support continued with the School Feeding Initiative through consultations with MOE and key stakeholders regarding the School Feeding Pilot Project in ensuring appropriate standards are being maintained for nutrients and meals (see chapter on Education).

Environmental Health

Under the Pesticide and Control Act (1975), the GOJ developed a training and sensitization programme regarding the management of vector-borne diseases. This initiative targeted all field workers across the RHAs. Training was conducted by a Medical Entomologist and over 200 field workers received training and certification. The health promotion component of disease outbreaks and disaster preparedness in communities was strengthened through the development of a National Plan of Action. The Plan placed emphasis on prevention and early detection of dengue and cholera.

The Jamaica National Influenza Centre (NIC) at the University of the West Indies, Mona, noted an ongoing creative ability of influenza virus (commonly known as the flu) to mutate and change. During the year, there were outbreaks of the influenza virus, including the sub-type A (H1) pdm09, which caused respiratory illnesses considered fatal. Among these were three reported cases of a new strain of the influenza virus which caused deaths in some Caribbean islands. Activities continued in all parishes with the focus on elimination of breeding sites. In improving the management of vector borne diseases, the GOJ started an initiative targeting certification of workers under the Pesticide and Control Act (1975). The training delivered by a Medical Entomologist targeted all field workers; approximately 220 persons were trained and certified.

Epidemiological data from the MOH was disseminated through the 4th Annual Research Conference on November 28–29 under the theme, 'Environmental Health and Communicable Diseases'. According to WHO, multiple environmental factors including water supply, sanitation facilities, food and climate[21] can influence the spread of non-communicable diseases. Over the two day period, 190 persons were in attendance and over 15 presentations were made on the topical issues. The aim of the conference was to use evidence through research to inform policy issues such as:

– Community-based management of TB in Jamaica

20 http://www.dentistryiq.com/articles/2013/02/world-oral-health-day-2013-celebrate-oral-health-on-march-20.html

21 http://www.who.int/environmental_health_emergencies/disease_outbreaks/communicable_diseases/en/

– Adherence to highly active antiretroviral therapy among HIV-infected perinatal clinic attendees and the impact on vertical transmission of HIV in Jamaica

– Vaccination coverage for MMRI and MMR2 for birth cohorts 2000–2009

– Virulence determinants and antimicrobial resistance between methicillin-resistant and methicillin-sensitive *staphylococcus aureus*

– Hand washing compliance

– Disaster preparedness.

With financing from PAHO/WHO renewed efforts were made for the re-establishment of the Essential National Health Research Committee (ENHRC). The purpose of the committee was to identify an Essential National Research Agenda. Discussions surrounded the merge of the ENHRC with the existing HIV/STI Monitoring and Evaluation Reference Group (MERG) as one research entity within the MOH.

Enhancement of initiatives towards strengthening data sources continued. A key strategy included the application of the Geographic Information System (GIS) that assisted the MOH and external agencies in the production of maps and other data output depicting health events, services and infrastructure. The Clinton Health Access Initiative (CHAI) funded an HIV/STI GIS mapping tool for outreach testing. GIS mapping was used as a quality assurance improvement strategy that generated a Drinking Water Quality Programme using water sample point Global Positioning System (GPS) data. Some 25 Public Health Inspectors (PHI) received training in the use of GPS to support this initiative. Capacity building for the use of GPS data was enhanced under the NHIS strengthening, 68 additional health care workers inclusive of 18 PHIs received training to improve the general mapping capacity of the region.

SUPPORT CARE SERVICIES

Pharmacy Services

Essential medicines were made available through pharmaceutical services in public health centres and hospitals. Provisional data from the MOH showed that 212 410 patients[22] were served in public health centres during January–August 2013. A total of 726 295 pharmaceutical items were prescribed, 73.8 per cent of which were dispensed. Of the items prescribed 19.1 per cent were reportedly out of stock. The South East had the largest number of patient visits, items prescribed and dispensed (Table 23.7).

Of the patients who were admitted to hospital (in-patient cases) or visited clinics (outpatient cases) 635 087 had access to the pharmaceutical services between January and August 2013. The total number of items prescribed from public hospital pharmacies was 2 285 211, of which 72.6 per cent were prescribed to outpatients (Table 23.8). Approximately 77.9 per cent of the prescribed items were dispensed. Of those items dispensed, the majority was in the SERHA (34.25 per cent) and the WRHA (25.0 per cent) {see Table 23.8}[23].

Biomedical Equipment

The quality and capacity of biomedical equipment within the public sector were improved throughout the year through injections to repairs and replacement by projects undertaken by the Government in collaboration with international development partners (IDPs). A colposcope for the Mandeville Regional Hospital and a microscope for the National Public Health Laboratory were procured by the PAHO/WHO.

Standards and Regulations

Several guidelines for standards and regulations were developed. Regulation was one of the basic tools used by the MOH to carry out public policy through the formulation of standards and technical regulations on issues in health. Among the priority issues was the review of the standards and regulations for radiation safety. The Bureau of Standards Jamaica was identified as the agency to develop regulations for the use of radioactive materials and radiation emitting devices such as x-ray machines.

The MOH in collaboration with the Jamaica Association of Professionals in Nutrition and Dietetics developed a competency-based education standard for entry level nutritionists and dieticians. This guideline encompasses the required knowledge skills and attitude for the preparation of the entry level professional to improve service delivery. There were also regulatory steps in ensuring the safety of drinking water quality through the promulgation of public health

TABLE 23.8
PHARMACY SERVICES AT PUBLIC HOSPITALS BY REGION, 2013

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	626 107	1 659 104	518 375	1 263 119	185 543	449 544
South East	304 602	420 736	256 133	354 420	82 175	105 969
North East	92 064	309 788	74 009	238 056	33 081	93 452
Western	135 208	380 171	114 714	332 928	41 755	108 470
Southern	94 233	548 409	73 519	337 715	28 532	141 653

Note: Data is provisional and was only available for the period January - September 2013

Source: Ministry of Health

22 Data were for all parishes except St. Thomas, Hanover and Westmoreland

23 Data for the period were not comparable statistics from the MOH was only available for the period January to August 2012.

regulations for potable water, septage and septage haulage, and fees payable in different instances of violation.

Other issues were monitoring and policy direction for improved quality of nursing work through the Nursing Advisory Committee consisting of directors of nursing service, educators, and regional nursing supervisors. Monitoring visits were conducted in four hospitals and two health centres.

PARTNERS IN HEALTH CARE

The Diabetes Association of Jamaica

The strategic policy priorities of the Association focused on providing diabetes health care and education to persons who were afflicted with or at risk of developing Diabetes Mellitus. Activities such as the islandwide clinics, outreach screening, and diabetes education community training workshops were geared toward building local capacity and awareness within communities including faith-based institutions. A Day of Care initiative specifically targeted the homeless with screening of 250 persons, of which, 25 were known to be diabetic and hypertensive. The aim was to empower those that were unaware of their medical status to adopt a more healthy approach.

Strategies were directed towards prevention and care among the young because of the increased risks among this population. Screening programmes were extended to a mix of schools (primary and secondary) through numerous visits during which there were presentations and health checks. Approximately 25 new cases of diabetes were identified; incidence was higher among girls (70.0 per cent). In addition, the Associations' 'Life for a Child' Programme continued to improve the treatment and well-being of children and young adults who are unable to afford diabetic supplies. Over 350 children at 10 centres across the island were provided with glucometers, monthly supplies of strips, insulin syringes and A1C testing for children. In collaboration with the MOH, the annual 'Camp Yellow Bird', a juvenile diabetes camp was successfully hosted, over 60 youngsters with diabetes and their peers from different socio-economic backgrounds attended. Through the Diabetes Association of Jamaica's Children's Registry project, a standardized protocol and a pocketbook of guidelines for the management of diabetes among youths were developed. Both were designed for regional adaptation.

The National Council on Drug Abuse (NCDA)

The National Council on Drug Abuse (NCDA) focused on Drug Abuse, Prevention and Treatment. The Agency continued its initiatives to achieve the goal of behaviour change in the area of substance use and abuse among the general population. The implementation of substance abuse prevention programmes, primary treatment, and public awareness initiatives were the primary activities within the period. The interventions were conducted in educational and faith based institutions, social clubs, occupational groups, communities, parties and other events where alcohol was served. The NCDA participated in 240 presentations islandwide with 14 395 beneficiaries. More than 1 000 persons viewed 93 exhibitions mounted at health fairs and expositions in various events held by schools, churches and other stakeholders across the island. This was interspersed with various media opportunities and public service announcements regarding the various events and programmes.

The main programme branded 'Tek it to Dem', targeted the homeless population by providing testing for drug-related issues as well as HIV/AIDS. To date, a total of 413 persons were tested, of which the following cases were identified: 12 positive for HIV (9 males and 3 females); 86 positive for marijuana; 12 positive for crack/cocaine; and 2 positive for methamphetamine. Other aspects of programme involved capacity building workshops and training. Peer educators were trained to carry out intervention on homeless drug users and 1 369 peers were reached. A total of 8 952 condoms were distributed among the same population.

Pan American Health Organization (PAHO)/World Health Organization (WHO)

There was continued support through technical assistance, provision of access to funding for programmes and research and capacity building through training by PAHO Jamaica. The PAHO/WHO Country Cooperation Strategy (2010-2015) reflected the expansion of technical cooperation provided to Jamaica. Approximately 84.0 per cent ($78.5 million) of the budgetary allocation were disbursed to support three main programmes:

- Strengthening Governance and Health systems within the framework of renewed Primary Health Care. Achievements under this initiative included support in the development and finalization of the National Health Information System and e-Health Strategic Plan; interventions to achieve Rubella and Congenital Rubella Syndrome (CRS) elimination and maintenance of Polio eradication
- Disease Prevention and Control programme focused on reduction of the burden of diseases through support for the finalization of the National Non-Communicable Diseases Strategic Plan 2013–2017, and the implementation of the WHO 12 collaborative activities against HIV/AIDS and Tuberculosis. There was also strengthening of capacity building in Disease Surveillance
- Initiatives for Sustainable Development and Environmental Health and protection were aligned with the WHO Tobacco Free Initiative and directed toward support for the introduction of the Legislation on Tobacco Control. In the promotion of environmental health support was also given for the application of a Hospital Safety Index that identified hospital's strengths and weaknesses including operations in emergencies and disasters.

The Nurses Association of Jamaica (NAJ)

Through multi-sectoral partnerships the NAJ Poverty Alleviation Programme offered scholarships, financial assistance and support to needy children and the homeless. Linkages were maintained with the Ministry of Health and its overseas partners through representation on Diaspora Taskforce with the objective of forging professional alliance and lobbying economic support for secondary and primary health facilities. The NAJ conducted several research and evidence-based activities to validate issues identified in the health system through the newly established research arm and publication of the Jamaican Nurse Journal.

RISE[24] Life Management Services

In working towards accomplishing the mission of providing educational, vocational and health-related services for at-risk-populations, RISE established two units—a Project and Service Unit—supported by the Ministry of Health and other RISE partners. The Project Unit operated community, school-based, social and vocational projects aimed to equip at-risk-youth in these specific areas with skills and knowledge to prepare them to live productive lives. Under the Service Unit, RISE offered school-based drug and gambling prevention educational sessions; training for guidance, peer and telephone lifeline counsellors; and community youth leaders. The Unit also offered islandwide telephone counselling services and drug testing for addictive disorders. The National Telephone Lifeline operated for approximately 15 hours daily. A total of 547 calls were registered up to December—52.0 per cent for substance abuse, 39.0 per cent solicited information, and 7.0 per cent focused on gambling. Kingston and St Andrew accounted for 52.6 per cent of the calls and 15.6 per cent were from St Catherine. The 20–35 age group recorded the highest substance abuse (42.0 per cent).

Over 6 000 beneficiaries were directly or indirectly impacted throughout the year. Under the recycling and income generating programme, 90 youth (15–24 years) and 700 students in primary schools received environmental protection education. Sensitization programmes related to HIV prevention impacted over 3 000 youths, including vulnerable groups such as the hearing impaired. Vocational and training classes such as the Adolescent Facilitators, offered by RISE, were accredited by the HEART/NTA and are recognized nationally. Generally, the focus surrounded formation of partnerships geared towards the development of more social enterprise aimed at providing income for youths.

OUTLOOK

The MOH introduced in February 2014, a swipe card to track the utilization of public drugs, and other resources consumed in the island's public health facilities, in an effort to protect the inventory of the State. The GOJ Health Card will also facilitate greater efficiency in billing private insurance carriers and henceforth lead to increased resources from a health financing standpoint. It will facilitate retrievable record of patient utilization of the health service by tracking resources utilized by patients. The card was rolled-out in phases across the island's public health facilities. By the end of the 2013/14 fiscal year, implementation will be advanced in all regional hospitals, the four centres of excellence at primary health care, and all existing Drug Serv Pharmacies.

The Occupational Health and Safety Department of the Ministry of Labour and Social Security developed a profile of the national priority areas, gaps and weaknesses in Occupational Safety and Health (OSH) within workplaces. The profile assessment is a part of the progress towards tabling of an OSH Bill and development of a National OSH Policy in the 2014 legislative year.

The Electronic Patient Administration System (ePAS) will be implemented during the fiscal year 2014–2015. The system will be piloted in four regional hospitals and the four centres of excellence to inform changes needed to improve the implementation of ePAS. A steering committee was convened to monitor the implementation process, projected to be completed by 2018.

The national goal of cancer care is projected to reduce the burden and cost of preventable morbidity, disability, and avoidable premature mortality due to cancers. The MOH's five-year Strategic and Action Plan will entail a comprehensive care-path guided by a System of Excellence in Cancer Care and will comprise of public education and health promotion/prevention programmes, early detection (through screening), diagnosis and treatment, rehabilitation and palliative care.

The issue of sustainable health financing remains a major challenge for the health sector going forward. This was made clear with the observed retrenchment of donor support for the National HIV/STI Programme. On the wider scale, the Government's recurrent budgetary support was relatively flat, and the Ministry continued to grow liabilities in areas such as pharmaceuticals and some contracted services. The Ministry must now approach the issue of health financing with renewed purpose and the will to make the necessary structural reforms that will be required to ensure that the delivery of health care is not compromised due to insufficient financing.■

24 Reaching Individuals through Skills and Education (RISE)

CHAPTER 24

NATIONAL SECURITY AND JUSTICE

INTRODUCTION

Work continued in the various security and justice related ministries, departments and agencies towards achieving the targets that have been developed under the Vision 2030 Jamaica – National Development Plan (NDP). The National Security Policy was revised and a four tier system developed to identify threats facing Jamaica. Six key reforms were developed to address tier one threats. The Unite for Change Initiative was launched to oversee the implementation of the National Crime Prevention and Community Safety Strategy (NCPCSS). Implementation of the Citizens' Security and Justice Programme (CSJP) II continued in the 50 target communities and negotiations commenced for a third phase of the programme.

The Jamaica Constabulary Force (JCF) maintained its focus on managing crime and violence through a number of initiatives, in keeping with the recommendations from the JCF Strategic Review. The JCF also continued to promote community-based policing with the training of a select group of officers as Crime Prevention Officers in domestic violence. Mobile police posts were established in five communities in Spanish Town and the number of School Resource Officers increased. The overall reduction in the incidence of crime and violence continued in spite of an increase in the number of reported cases of murder. There was a change in the classification of crimes, with the term "Major crimes" being replaced with "Category 1" crimes, which was further subdivided into two groups: serious and violent crimes, and acquisitory crimes.

The South Camp Juvenile Correctional Centre became operational during the year and houses female juveniles who were previously located at the Fort Augusta Adult Correctional Centre and the Diamond Crest Juvenile Correctional Centre. A suicide/self-harm policy was developed and juveniles were sensitized about suicide/self-harm. The reclassification exercise that enables an inmate to be transferred to lower security risk institutions continued during the year.

In the area of justice, implementation of the Justice Undertakings for Social Transformation programme (JUST) continued with a number of activities aimed at institutional strengthening. Implementation of the National Plan of Action on Child Justice commenced. The draft National Child Diversion Policy was completed and consultations held. In addition, a number of Restorative Justice Facilitators were trained in Child Rights and Responsibilities to facilitate implementation of the National Child Diversion Programme. Several pieces of legislation were also enacted or amended.

FINANCING

Budget allocation for the Ministry of National Security (MNS) and its departments and agencies[1] for fiscal year (FY) 2013/14 was approximately $48.0 billion, which represented 9.2 per cent of the Government of Jamaica (GOJ) budget[2]. This was the third largest allocation after the Ministry of Finance and Planning, and the Ministry of Education, and just under $1.0 billion lower than the allotment for the previous year (Table 24.1a).

The MNS budget is shared between the central ministry and its three departments: the Jamaica Constabulary Force (JCF), the Department of Correctional Services (DCS) and the Jamaica Defence Force (JDF). The JCF continued to receive the largest portion of the MNS's allocation, accounting for almost $30.0 billion of the total budget; followed by the JDF with approximately $12.1 billion. The recurrent allocation amounted to 92.8 per cent of the total budget. Total Capital A allocation was approximately $2.0 billion (less appropriation in aid) and was spent primarily on purchasing and repairing vehicles, weapons and equipment, and constructing and repairing physical infrastructure.

Official Development Assistance (Capital B Budget) for the ministry was almost $1.5 billion and the allocation went to a number of projects including:

- Citizens' Security and Justice Project (CSJP) II, funded by IDB/DFID
- Poverty Reduction Programme (PRP) II, funded by the EU
- Metcalfe Street Project, funded by UNDP
- Rehabilitation and Reintegration of Local Offenders and Deported Persons Programme, funded by the British Foreign and Commonwealth Office
- Jamaica National Crime Victimization Survey (JNCVS), funded by DFID
- Caribbean Basin Security Initiative, funded by the Bureau of International Narcotics and Law Enforcement Affairs (USAID) {Figure 24A}.

Budget allocation for the Ministry of Justice (MOJ) for FY 2012/13 totalled approximately $4.7 billion; which was 0.9 per cent of the total GOJ budget and almost $0.3 billion more than the allocation for the previous period (Table 24.1b). The central administration of the MOJ received the largest proportion of the budget, approximately $1.4 billion followed by the

1 Does not include the Passport, Immigration and Citizenship Authority
2 Annual average inflation rate for 2013 and 2012 was 9.5 per cent, and 8.0 per cent, respectively.

TABLE 24.1A
MINISTRY OF NATIONAL SECURITY
RECURRENT AND CAPITAL BUDGET
BY FUNCTION
2012/13-2013/14
$'000

RECURRENT	REVISED ESTIMATE 2012/13	ESTIMATE 2013/14
Ministry of National Security	1 512 626	1 456 860
Jamaica Defence Force	11 709 520	10 993 643
Jamaica Constabulary Force	29 037 358	27 477 928
Department of Correctional Services	4 608 283	4 609 638
SUBTOTAL	46 867 787	44 538 069
CAPITAL A		
Jamaica Defence Force	602 463	1 130 730
Jamaica Constabulary Force	1 096 202	941 383
Department of Correctional Services	279 505[a]	272 768[a]
SUBTOTAL	856 511	1 956 381
CAPITAL B		
Jamaica Constabulary Force	1 086 450	1 405 458
Department of Correctional Services	111 907	28 000
Other Social and Community Services	1 000	49 018
SUBTOTAL	1 199 357	1 482 476
TOTAL	**48 923 655**	**47 976 926**

a - Less Appropriation in Aid
Source: Estimates of Expenditure - for fiscal year ending March 31, 2014

Resident Magistrates' Courts (RM Courts), Supreme Court and the Attorney General's chambers. The recurrent allocation was 88.8 per cent of the total budget. The Capital A allocation of the MOJ was primarily for: undertaking phase 1 construction of Justice Square, renovating a site to house the ministry and purchasing eight motor vehicles for judges. The approximately $0.3 billion in Official Development Assistance (Capital B

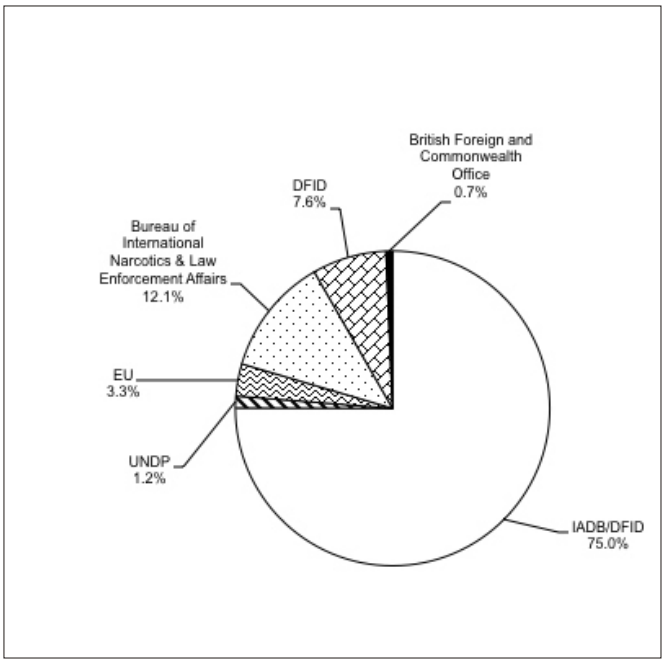

FIGURE 24A: ODA ALLOCATION FOR THE MNS, 2013

TABLE 24.1B
MINISTRY OF JUSTICE
RECURRENT AND CAPITAL BUDGET
BY FUNCTION
2012/13-2013/14
$'000

RECURRENT	REVISED ESTIMATE 2012/13	ESTIMATE 2013/14
Ministry of Justice	756 944	823 444
Court of Appeal	141 740	160 903
Director of Public Prosecution	257 827	268 000
Family Court	169 192	168 755
Resident Magistrates' Courts	1 039 308	1 051 680
Revenue Court	2 833	2 763
Supreme Court	719 488	752 998
	a	a
Administrator General	113 913	130 913
Attorney General	456 682	467 598
Trustee in Bankruptcy	38 355	40 534
Office of Parliamentary Counsel	84 775	84 861
Legal Reform Department	44 025	46 598
Court Management Services	194 613	205 113
SUBTOTAL	4 019 695	4 204 160
CAPITAL A		
Ministry of Justice: Public Order & Safety Services	402 743	410 000
	a	a
SUBTOTAL	223 500	300 000
CAPITAL B		
Ministry of Justice: Public Order & Safety Services	205 526	230 000
SUBTOTAL	205 526	230 000
TOTAL	**4 448 721**	**4 734 160**

a - Less appropriation in Aid
Source: Estimates of Expenditure - for fiscal year ending March 31, 2014

Budget) was for funding the justice component of the IDB/DFID funded CSJP II, and the following:

– National Child Diversion Programme, funded by UNICEF

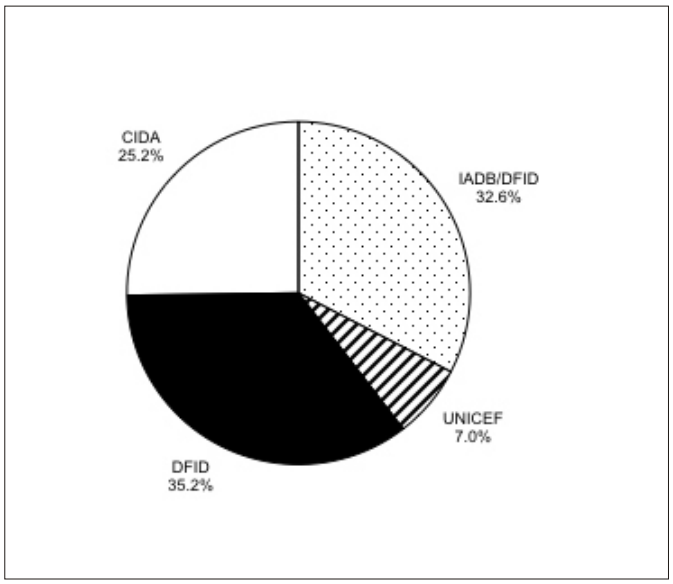

FIGURE 24B: ODA ALLOCATION FOR THE MOJ, 2013

TABLE 24.2
ESTABLISHMENT AND STRENGTH OF THE JAMAICA CONSTABULARY FORCE AS AT DECEMBER 31, 2013

RANK	OLD ESTABLISHMENT	NEW ESTABLISHMENT	STRENGTH
Commissioner	1	1	1
Deputy Commissioner	3	4	5
Assistant Commissioner	15	19	18
Senior Superintendent	30	38	23
Superintendent	62	78	82
Deputy Superintendent	141	168	15
Assistant Superintendent	31	100	27
Inspector	400	512	494
Sergeant	1 119	1 342	1 338
Corporal	1 802	2 081	2 024
Constable	4 896	5 657	5 573
TOTAL	**8 500**	**10 000**	**9 740**

Source: Jamaica Constabulary Force, Statistics Division

– Justice Undertakings for Social Transformation, funded by CIDA

– JCF Accountability Programmes (support to the Independent Commission of Investigations, funded by DFID (Figure 24B).

NATIONAL SECURITY

The National Security Policy provides the framework for dealing with the issue of crime and violence in Jamaica. The main government agencies working in this area are the Jamaica Constabulary Force (JCF), Ministry of National Security (MNS), Jamaica Defence Force (JDF) and the Department of Correctional Services. The work of these agencies is supported by the implementation of a number of sector specific social intervention programmes.

JAMAICA CONSTABULARY FORCE

Personnel

The strength of the **Jamaica Constabulary Force (JCF)** stood at 9 740 (2 170 females); a 5.2 per cent increase compared with 2012 (Table 24.2). This was 2.6 per cent below the new establishment size of 10 000. During the year, 753 new recruits (117 females) were enlisted in the Force, while 691 JCF and 93 Island Special Constabulary Force (ISCF) recruits graduated from the police college. The increase in the number of persons being recruited is part of the strategy aimed at increasing the establishment size to 12 000. The JCF recorded an attrition of 210 persons (31 females) compared with 306 in 2012. This was mainly due to: resignation (52.4 per cent), retirement (29.5 per

TABLE 24.3
NUMBER AND TYPES OF CATEGORY 1 CRIMES REPORTED AND CLEARED UP, 2011–2013

OFFENCE	2011 Reported	Cleared Up	2012 Reported	Cleared Up	2013 Reported	Cleared Up	2012/ 2013 Per cent change in Reported Crime	2012/ 2013 Per cent change in Crimes Cleared Up
A. Serious and Violent Crimes - Category 1								
Murder	1 133	474	1 099	424	1 200	493	9.2	16.3
Shooting	1 353	494	1 247	445	1 238	512	-0.7	15.1
Rape	845	384	948	380	814	390	-15.1	2.6
Aggravated Assault[a]	269	136	678	409	599	427	-12.0	4.0
TOTAL	**3 600**	**1 488**	**3 972**	**1 658**	**3 851**	**1 822**	**-3.0**	**10.0**
B. Acquisitory Crimes - Category 1								
Robbery	3 092	548	2 771	504	2 658	468	-4.0	-7.0
Break-in	3 501	589	3 231	487	2 503	534	-23.0	10.0
Larceny from person, dwelling, motor vehicle	425	145	758	188	530	173	-30.0	-8.0
TOTAL	**7 018**	**1 282**	**6 760**	**1 179**	**5 691**	**1 175**	**-16.0**	**-0.3**
GRAND TOTAL	**10 618**	**2 770**	**10 732**	**2 838**	**9 542**	**2 997**	**-11.1**	**5.6**

a: Aggravated Assault currently refers to crime of Felonious Wounding and Wounding with Intent that does not involve a gun
Note: Data on all crimes were not available at the time of publication

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

BOX 1: CATEGORY 1 CRIME RATE BY PARISH, 2013

PARISH	RATE PER 100 000
Manchester	423
Kingston and St. Andrew	421
St. James	387
St. Ann	361
Hanover	356
Trelawny	354
St. Catherine	330
Westmoreland	323
Clarendon	313
St. Mary	267
St. Elizabeth	256
Portland	256
St. Thomas	211

cent), death (9.5 per cent) and not being permitted to re-enlist (4.8 per cent). The ISCF establishment size is 2 091 and the strength at the end of 2013 was 2 011. Some 76 members were lost due to retirement (40), resignation (17), dismissal (7), death (6), judicial conviction (3), and desertion and declining to re-enlist (1 each). The establishment size for the District Constables (also referred to as rural police) is 1 502 and the strength was 1 053 (566 females). There were 2 583 civilian staff; 1 143 temporary, 862 established positions and 578 permanent.

Category 1 Crimes

In 2013, the JCF made changes to its classification of crimes and the term "Major crimes" was replaced with "Category 1" crimes. Category 1 is the new classification of crimes that are considered serious and sometimes coupled with acts of violence. The Category 1 crime classification is further subdivided into two groups: serious and violent crimes, and acquisitory crimes. Under this new system, sexual intercourse with a child under 16 years of age[3] is not regarded as a Category 1 crime, while, aggravated assault is now considered a Category 1 crime. Aggravated assault refers to felonious wounding and wounding with intent that does not involve the use of a firearm.

BOX 2: CATEGORY 1 CRIMES COMMITTED AND CLEARED UP BY PARISH, 2013

PARISH	NUMBER OF CATEGORY 1 CRIMES COMMITTED	NUMBER OF CATEGORY 1 CRIMES CLEARED UP	PER CENT CLEARED UP
St. Andrew	1 800	405	22.5
St. Catherine	1 716	344	20.1
Kingston	1 008	314	31.1
Manchester	809	167	20.6
Clarendon	774	208	26.9
St. James	717	241	33.6
St. Ann	627	202	32.2
Westmoreland	469	183	39.0
St. Elizabeth	388	80	20.6
St. Mary	306	102	33.3
Trelawny	268	90	33.6
Hanover	249	83	33.3
Portland	211	110	52.1
St. Thomas	200	89	44.5

Based on the new system, the total number of category 1 crimes reported declined from 10 732[4] in 2012 to 9 542 (Table 24.3). There was a reduction in the incidence of all crimes except murder. The major crime rate declined from 396 per 100 000 in the previous year to 351 per 100 000 population. Approximately 63.0 per cent of the category 1 crimes were committed in the parishes of St. Andrew, St. Catherine, Kingston, Manchester, St. James and Clarendon (Table 24.4). The category 1 crime rate for all parishes is listed in Box 1. Some 2 997 cases were cleared up by the end of the year. Of this number, 2 618 were related to crimes committed in the reporting year. The parish of Portland had the highest clear up rate (52.1 per cent) while St. Catherine had the lowest (20.1 per cent). See Box 2 for the number of reported crimes cleared up during the year.

TABLE 24.4
CATEGORY 1 CRIMES BY PARISH, 2013

Parish	Murder	Shooting	Rape	Aggravated Assault	Robbery	Break-in	Larceny	Total
Kingston	163	233	60	59	277	129	87	**1 008**
St. Andrew	208	226	136	51	691	402	84	**1 800**
St. Catherine	225	253	159	62	593	383	41	**1 716**
St. James	166	155	76	32	173	94	21	**717**
Trelawny	26	25	19	21	41	117	19	**268**
Westmoreland	89	86	52	35	83	105	19	**469**
Hanover	34	35	41	29	35	64	11	**249**
St. Mary	35	20	28	42	60	106	15	**306**
St. Ann	35	34	35	61	166	230	66	**627**
Portland	9	8	24	31	30	94	15	**211**
Manchester	35	26	42	83	190	332	101	**809**
Clarendon	112	90	80	38	199	223	32	**774**
St. Elizabeth	31	27	29	35	87	166	13	**388**
St. Thomas	32	20	33	19	32	58	6	**200**
Total	**1 200**	**1 238**	**814**	**599**	**2 658**	**2 503**	**530**	**9 542**

Source: Jamaica Constabulary Force, Statistics and Data Management Unit

3 Formerly referred to as Carnal Abuse

4 The data for the years 2011–2013 were recalculated based on the new system.

A total of 35 794 persons were arrested and charged during the year, 7 847 less than in 2012. Of this number, 3 397 (96.9 per cent male) were for category 1 crimes, with 68.5 per cent of those arrested being in the 16–30 age group. Some 40.6 per cent of 106 females arrested was for aggravated assault, while three were arrested for rape (Table 24.5). There were 11 108 victims (60.7 per cent male) of category 1 crimes. Approximately 65.5 per cent of victims were under 45 years of age, with 22.0 per cent between 15 and 24 years of age and 10.3 per cent between 0 and 18 years of age (Table 24.6).

Murder

The number of reported murders increased by 9.2 per cent to 1 200, an increase in the murder rate to approximately 44 per 100 000 population from 40 per 100 000 population in 2012. At the end of the year, 493 cases were cleared up, with 388 being crimes committed during the year. As it relates to the locale in which these murders occurred, the trend continued with the parishes of St. Catherine, St. Andrew, St. James, Kingston and Clarendon recording the most murders with 225, 208, 166, 163 and 112 murders, respectively, while Portland recorded the lowest (9). The murder rate for all parishes is listed in Box 3.

The number of females murdered increased to 129 from 127 in 2012. There was also an increase in the number of persons (0–18 years old) murdered, to 70 from 60 in 2012. Nine police officers were killed. Firearms were used to commit 73.4 per cent of all murders (Figure 24C). "Gang-related activities" was cited as the primary motive for 77.9 per cent of reported murders followed by "Criminal (not gang related)" with 14.7 per cent (Figure 24D). There were 76 domestic related murders (44 males), 27 less than in the previous year.

Shootings

Reported shootings totalled 1 238, which reflects a slight decline (0.7 per cent) compared with 2012. The number of injuries in relation to shootings increased to 851, approximately 22.1 per cent more than in 2012. By the end of the year, 512 cases had been cleared up and of this number 442 were related to incidents that occurred in the reporting period.

BOX 3: MURDER RATE BY PARISH, 2013

PARISH	RATE PER 100 000
St. James	90
Westmoreland	61
Kingston and St. Andrew	56
Hanover	49
Clarendon	45
St. Catherine	43
St. Thomas	34
Trelawny	34
St. Mary	31
St. Ann	20
St. Elizabeth	20
Manchester	18
Portland	11

Additionally, there were 255 fatal shootings[5], 21 more than in 2012. Of this total, 92.9 per cent was due to police shootings. During the year, 97 firearms and 2 080 rounds of ammunition were reported stolen. The JCF however recovered 728 firearms and 8 766 rounds of ammunition.

Missing Persons

A total of 3 095 persons were reported missing during the year, which was 6.3 per cent more than in 2012. Some 71.5 per cent (2 212) was children, of which 78.3 per cent (1 731) was female; while of the 883 adults reported missing 64.8 per cent (572) was male. Some 2 590 persons (1 939 children) were returned or found, 77 (15 children) were confirmed dead, while 428 (257 children) were still unaccounted for at the end of the year.

Suicides

There were 52 reported cases of suicide (42 male). Most of those who committed suicide were in the 31–35 age group (8 cases), followed by the 16–20 and 21–25 age groups (7 cases each) and the 36–40 and 41–45 age groups (5 cases each). The most common method used was hanging, which accounted for

TABLE 24.5
AGE GROUP AND SEX OF PERSONS ARRESTED FOR CATEGORY 1 CRIMES, 2013

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	M	F	
12-15	6	0	7	0	15	1	38	1	11	1	39	1	19	3	135	7	**142**
16-20	107	6	147	2	205	4	192	4	55	2	102	1	92	12	900	31	**931**
21-25	175	3	167	2	153	2	127	5	36	1	75	1	78	9	811	23	**834**
26-30	116	0	117	1	102	3	92	3	23	2	42	0	53	7	545	16	**561**
31-35	50	1	65	0	55	0	66	1	18	2	42	0	42	5	338	9	**347**
36-40	30	4	22	0	32	2	44	1	14	2	33	0	40	3	215	12	**227**
41-45	26	1	17	0	16	0	22	1	6	0	37	0	33	3	157	5	**162**
46-50	11	0	5	0	6	0	17	1	7	0	14	0	22	1	82	2	**84**
51-55	8	0	6	0	4	0	12	0	3	1	13	0	17	0	63	1	**64**
56-60	2	0	1	0	1	0	3	0	2	0	11	0	6	0	26	0	**26**
61& Over	1	0	2	0	0	0	3	0	0	0	6	0	7	0	19	0	**19**
Total	**532**	**15**	**556**	**5**	**589**	**12**	**616**	**17**	**175**	**11**	**414**	**3**	**409**	**43**	**3 291**	**106**	**3 397**

a - Arrest may not relate to crimes committed in 2013

Source: Jamaica Constabulary Force Statistics and Data Management Unit

5 Fatal shootings are shootings by persons licensed to carry a firearm and include police officers, soldiers, specific security guards and private licensed firearm holders.

TABLE 24.6
AGE GROUP AND SEX OF VICTIMS OF CATEGORY 1 CRIMES, 2013

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	F	M	F	M	F	
0-4	4	5	1	3	1	0	0	0	0	0	3	0	1	6	12	**18**
5-9	1	1	4	4	0	0	0	0	0	0	17	1	0	8	22	**28**
10-14	3	3	6	8	29	16	2	10	1	3	191	4	6	45	237	**282**
15-19	67	12	107	27	206	174	34	37	10	23	267	65	21	489	561	**1 050**
20-24	144	22	187	46	258	291	71	94	21	43	133	69	19	750	648	**1 398**
25-29	172	11	161	27	258	218	109	147	18	37	59	63	19	781	518	**1 299**
30-34	140	13	144	20	218	164	168	182	21	43	35	58	16	749	473	**1 222**
35-39	107	8	108	18	185	127	165	167	27	33	24	46	18	638	395	**1 033**
40-44	104	17	80	17	183	126	153	146	32	27	23	32	9	584	365	**949**
45-49	97	7	69	16	161	85	152	146	17	22	10	42	5	538	291	**829**
50-54	62	7	44	12	123	80	118	131	19	18	10	20	5	386	263	**649**
55-59	44	4	36	6	115	53	100	83	23	16	8	13	4	331	174	**505**
60-64	18	4	23	4	62	36	87	52	13	12	1	10	4	213	113	**326**
65 & Over	32	10	15	2	110	84	131	94	25	20	8	12	2	325	220	**545**
Unknown	77	4	747	19	31	13	18	11	5	6	25	18	1	896	64	**960**
TOTAL	**1 072**	**128**	**1 732**	**229**	**1 940**	**1 467**	**1 308**	**1 300**	**232**	**303**	**814**	**453**	**130**	**6 737**	**4 371**	**11 108**

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

82.7 per cent of all suicides followed by the ingestion of a poisonous substance, 7.7 per cent. The main contributing factors were depression and domestic problems (19.2 per cent each) and mental disorder (13.5 per cent), while for 46.2 per cent the reasons were unknown. There was one case of murder suicide.

Deportation

A total of 2 139 Jamaicans (85.1 per cent male) were deported during the year, 7.4 per cent less than in 2012 (Table 24.7). Some 85.6 per cent of persons deported were between 21 and 50 years of age. Overstaying, illegal entry and illegal re-entry continued to account for the majority of persons deported (37.0 per cent), followed by drug infringements, with 32.7 per cent. Some 71.4 per cent of persons deported were from the three major destinations for Jamaicans: the United States of America (USA), the United Kingdom (UK) and Canada. However, there was a 13.3 per cent reduction in the total number of persons deported from these three countries. The largest proportion of deported persons, 49.1 per cent, came from the USA, followed by the UK with 13.6 per cent. The majority of persons deported from the USA and the UK, 85.6 per cent and 73.2 per cent, respectively, was for criminal activity; while 70.4 per cent of those deported from Canada and other countries were for overstaying or illegal entry/re-entry. Over 71.6 per cent of persons deported will be returning to the parishes of Kingston and St. Andrew, St. Catherine, Clarendon and St. James.

Traffic Accidents

Traffic accidents totalled 7 185 and resulted in varying degrees of injury; the 306 fatalities resulted from 274 traffic

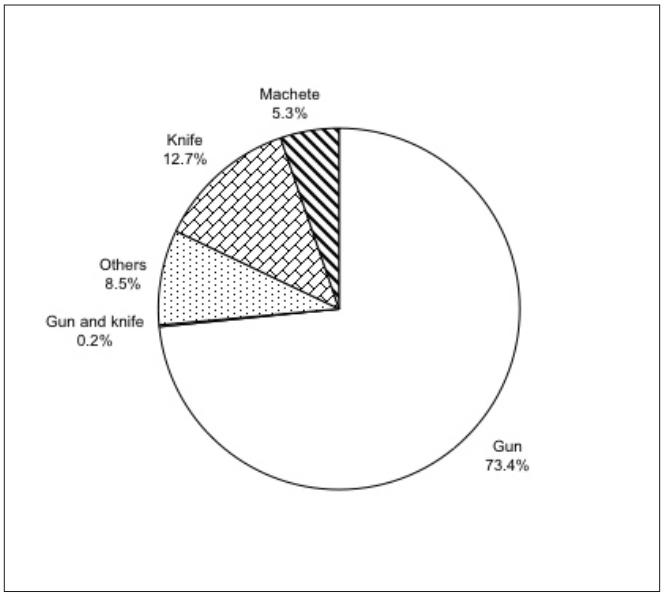

FIGURE 24C: PERCENTAGE DISTRIBUTION OF TYPES OF IMPLEMENTS USED IN MURDER, 2013

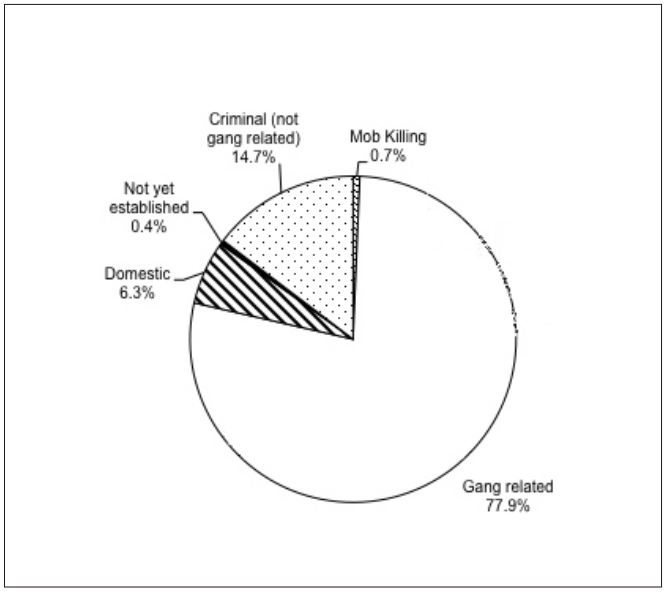

FIGURE 24D: MOTIVES FOR COMMITTING MURDER, 2013

TABLE 24.7
NUMBER OF PERSONS DEPORTED TO JAMAICA BY TYPE OF CRIME AND COUNTRY, 2012 AND 2013

OFFENCE	2012 USA	2012 CANADA	2012 UNITED KINGDOM	2012 OTHER	2012 TOTAL	2013 USA	2013 CANADA	2013 UNITED KINGDOM	2013 OTHER	2013 TOTAL
Possession of Drugs	573	21	58	69	**721**	481	25	110	83	**699**
Firearm Offences	77	8	8	6	**99**	95	10	12	1	**118**
Murder, Manslaughter, Attempted Murder	47	1	9	3	**60**	41	7	11	4	**63**
Illegal Entry, Overstay, Illegal Re-entry	166	160	139	429	**894**	151	96	78	466	**791**
Larceny Offences	97	8	20	4	**129**	56	7	21	7	**91**
Fraud, False Document	36	8	13	15	**72**	50	5	16	18	**89**
Wounding, Assault, Battery	125	9	28	9	**171**	89	12	18	3	**122**
Sexual Offences	40	3	12	4	**59**	34	6	12	2	**54**
Kidnapping	9	0	5	0	**14**	4	0	2	0	**6**
Money Laundering	7	0	2	0	**9**	11	0	1	0	**12**
Other Offences	43	18	11	9	**81**	38	18	10	28	**94**
TOTAL	**1 220**	**236**	**305**	**548**	**2 309**	**1 050**	**186**	**291**	**612**	**2 139**

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

accidents. The parishes of St. Catherine (54), Westmoreland (41) and St. Andrew, St. Ann, Hanover and St. James (21 each) recorded the most fatalities, while Portland recorded the lowest number of fatalities (3) {Table 24.8}. An analysis of fatalities as a result of traffic accidents showed that 28.8 per cent was pedestrians, 18.0 per cent motor cyclists, and 16.0 per cent each private motor car drivers and private motor car passengers. Approximately 12.1 per cent of the victims were below 20 years of age versus 13.5 per cent in 2012. Males accounted for 80.4 per cent of all road fatalities (Table 24.9). Excessive speeding was identified as the main cause of accidents in 23.8 per cent of the incidents followed by "other factors" (22.7 per cent), failure to keep near side (20.9 per cent) and pedestrian error (14.7 per cent).

Anti-Crime Measures

The anti-crime measures are actions introduced by the JCF during the year to improve their efficiency and the overall crime situation in the country. The major actions undertaken included:

- Implementation of Divisional Intelligence Units and a Violence Reprisal Risk Ranking (V3R) system
- Construction of a mobile police post in the Gravel Heights community
- Establishment of mobile community security and dispute resolution centres in the Lauriston, March Pen and Shelter Rock communities
- Activation of the Divisional Fugitive Apprehension team which is now operational across the 19 geographic divisions; this team conducts covert operations leading to the arrest of fugitives wanted for serious crimes
- Implementation of the JCF Visitor Security Strategy in tourist areas.

Implementation of the JCF Strategic Review

During the calendar year, the following activities were undertaken in implementing the recommendations of the JCF Strategic Review:

- The Fleet Management Policy and Standard Operating Procedures was completed and is awaiting the approval of the Commissioner of Police
- The crime intelligence management system, SardonyxCIMS was expanded to all geographical divisions except Trelawny and Hanover
- The JCF Anti-Corruption Strategy was revised

TABLE 24.8
REPORTED ROAD ACCIDENTS INVOLVING FATALITIES BY PARISH, JANUARY 1 TO DECEMBER 31, 2013

PARISH	NUMBER OF ACCIDENTS INVOLVING FATALITIES	NUMBER OF PERSONS KILLED
Kingston	18	19
St. Andrew	35	21
St. Thomas	5	5
Portland	3	3
St. Mary	17	20
St. Ann	19	21
Trelawny	9	16
St. James	18	21
Hanover	18	21
Westmoreland	38	41
St. Elizabeth	10	12
Manchester	15	20
Clarendon	15	17
St. Catherine	54	54
TOTAL	**274**	**306**

Source: Jamaica Constabulary Force, Statistics and Data Management Unit

TABLE 24.9
AGE GROUP AND SEX OF ROAD USERS WHO DIED IN TRAFFIC ACCIDENTS
2012 AND 2013

	2012			2013		
Age Group	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**
00-04	4	2	**6**	3	1	**4**
05-09	4	2	**6**	3	2	**5**
10-14	0	1	**1**	5	2	**7**
15-19	17	5	**22**	11	10	**21**
20-24	28	6	**34**	24	5	**29**
25-29	23	5	**28**	30	5	**35**
30-34	13	1	**14**	17	7	**24**
35-39	15	1	**16**	27	4	**31**
40-44	20	0	**20**	17	2	**19**
45-49	8	9	**17**	15	1	**16**
50-54	11	1	**12**	13	1	**14**
55-59	10	0	**10**	16	2	**18**
60-64	15	2	**17**	13	4	**17**
65-69	10	3	**13**	5	1	**6**
70-74	2	3	**5**	11	2	**13**
75 & OVER	16	6	**22**	13	10	**23**
Unknown	16	1	**17**	23	1	**24**
TOTAL	**212**	**48**	**260**	**246**	**60**	**306**

Source: Jamaica Constabulary Force, Police Traffic Department

- The JCF's Central Vetting (Polygraph) Unit and requisite policy framework was developed and promulgated in the Force Orders. The unit was developed as one of the strategies to reduce corruption in the Force. The number of trained polygraph examiners was increased to five
- Divisional Court Liaison desks were established with the Criminal Intelligence Bureau, Supreme Court, Circuit Court, and the Resident Magistrate and Gun Courts islandwide to allow for a more effective and efficient means of communication with the justice system
- A gap analysis was conducted by the Police National Computer Centre (PNCC) to determine the level of training required by its members and a plan to train 300 members of the JCF in basic office productivity tools developed
- A submission was made to Cabinet regarding the merger of the ISCF and the JCF
- A submission was made to Cabinet to merge the police academy and staff college into a single entity called the National Police College of Jamaica
- Under the civilianization programme, submission was made to the Cabinet for the establishment of a number of posts, while others were upgraded/established.

Major Organized Crime and Anti-Corruption Task Force (MOCA)

The passing of the Law Reform (Fraudulent Transactions) (Special Provisions) Act 2013, served to improve MOCA's ability to undertake initiatives to deal with transnational organized crime and corruption. During the year, 57 persons were arrested, 51 charged and 4 convicted. There was also the seizure of $82.0 million, 6 motor vehicles (with 3 restrained), 66.0 kg of cocaine, 23.0 kg hash oil and other assets totalling $1.2 billion. Since the enactment of the Law Reform (Fraudulent Transactions) (Special Provisions) Act 2013, some 246 persons have been arrested, 106 charged and 3 convicted for lottery related offences. Of the persons arrested, 116 were from special operations by the Anti-Lottery Scam Task Force, while the rest were from operations by other JCF divisions/formations. The Task Force seized 25 motor vehicles, 1 illegal firearm, and approximately $1.6 million and US$30 420.00.

Community Safety and Security Branch

During the reporting period, the Community Safety and Security Branch (CSSB) undertook a number of activities geared towards fostering improved relations between the police and the citizenry. A Memorandum of Understanding (MOU) was signed with the Social Development Commission for the implementation of a community scorecard across 19 communities under the Community Renewal Programme in the Kingston Metropolitan Area. The CSSB continued to work with **Police Youth Clubs** (PYCs) islandwide and four PYCs were formed while 20 were reactivated, 59 sensitized and 16 launched. There were a total of 268 active, 103 inactive and 104 dormant PYCs islandwide. Work also continued under the **Neighbourhood Watch Programme (NWP)** with 10 groups formed, 2 reactivated, 52 sensitized and 20 launched (includes 5 that were relaunched). There are 292 active and 394 inactive NWPs islandwide. Under the **Farm Watch Programme** (FWP), 18 Praedial Larceny Coordinators and 18 Assistant Praedial Larceny coordinators were deployed islandwide to facilitate implementation of the JCF Anti-Praedial Larceny Strategy. The CSSB also sought to build partnerships with a number of key stakeholders by participating in or facilitating over 3 589 meetings islandwide.

The 274 active school resource officers (SROs) undertook a number of activities in the 154 schools that are a part of the **Safe School Programme**. During the year, 9 129 searches were conducted, of which 8 875 were student searches, 218 were school compound searches and the remaining 36 were described as "other" searches. A number of weapons were seized, of which 128 were knives, 122 pairs of scissors, 6 ice picks, 2 machetes and 44 other weapons. There were 20 cases of seizure of marijuana. Some 298 incidents were reported, which included 4 murders, 168 fights, 64 cases of theft, 25 cases of wounding, 8 instances of sexual offence, 1 case of robbery and 28 "other" incidents. The actions taken by the police included 40 arrests; 555 students cautioned/warned; 126 students referred to other agencies such as the Child Development Agency, probation offices or various detox centres; 245 students being monitored; and 37 were described as "Other Actions". While there was an increase in the number of SROs and schools in the Safe School Programme, there was a 65.2 per cent reduction in the number of hours spent in schools to 8 328 hours from 23 965 hours in 2012. Some 1 198 lectures/rap sessions were conducted. The SROs also partnered with the Citizens' Security and Justice Programme on a "Safe School Tour".

Some 140 crimes against tourists were reported to the **Tourism Liaison Section**, 9 fewer than in 2012. The crimes included: 103 cases related to robbery/burglary/larceny/break-in/fraud; assault/wounding (15); sexual assault and shooting (6 each); and murders and malicious destruction of property (5 each). The majority of incidents occurred in St. Ann (22.1 per cent) followed by St. Andrew (15.7 per cent), Manchester (11.4 per cent), St. Catherine (10.0 per cent) and Westmoreland (9.3 per cent).

Organized Crime Investigation Division

The Organized Crime Investigation Division (OCID) undertook a number of operations during the year which:

- disrupted the operation of 4 major gangs in Kingston and St. Catherine, led to the arrest of 20 members and seizure of 8 firearms, 200 rounds of ammunition and several motor vehicles
- investigated 22 cases of money laundering and seized approximately $4.4 million (of which approximately $1.9 million was transferred to the government as forfeiture of proceeds)
- disrupted the operations of 4 human trafficking syndicates and charged 5 persons for various offences under the Human Trafficking Act
- confiscated over 6 million DVDs and CDs, and led to the arrest of 41 persons for various intellectual property offences
- investigated 7 cases of kidnappings, rescued the hostages and made 6 arrests
- investigated 411 reports of fraud, of which 216 were cleared up
- investigated 334 reports of crime, of which 196 were cleared up and 227 persons arrested.

Island Special Constabulary Force Tickets and Arrests

Tickets issued by the **ISCF** for offences totalled 225 343. There were 11 113 summonses and 9 249 arrests. The arrests were for Òother offences" (38.4 per cent), illegal vending (16.7 per cent), Praedial Larceny (0.7 per cent), and breaches of various Acts. These included: Dangerous Drugs Act 1987 (29.7 per cent); Offensive Weapon Act 2001 (7.0 per cent); Town and Communities Act 1997 (4.2 per cent); and Road Traffic Act 2005 (3.3 per cent).

Crime Stop Programme

The Crime Stop Programme, which is funded by the private sector under the National Crime Prevention Fund, continued to offer rewards to citizens providing information to the police. During the year, 773 calls were received which led to 42 arrests. Among those arrested, 20 were for drug charges, 7 illegal possession of firearm, 4 possession of stolen property and 2 each for murder, shooting and child abuse. The ratio of successes to calls made was 1:8. A breakdown of calls received showed that 16.6 per cent was related to gunmen; 14.9 per cent drugs; 9.1 per cent illegal firearms; 7.0 per cent murder; 6.9 per cent lottery scam; and 5.7 per cent wanted persons. As a result of information received the following were seized or recovered: 12 illegal firearms and 129 rounds of ammunition; 1 593.2 kilograms (kg) of cured marijuana; 95 sticks of marijuana; 9 stolen motor vehicles; and a number of other items. Additionally, 10.2 hectares of marijuana, 276 000 marijuana seedlings and 22.5 kg of marijuana seeds were discovered.

The narcotics seized were valued at approximately $48.5 million, 16.0 per cent more than in 2012. The total value of property recovered was approximately $4.9 million, 27.9 per cent less than in the previous year. At the end of the year, $447 600.00 was paid out in rewards. Since its inception in September 1989, a total of 23 924 calls have been received, of which 18 157 were investigated. This has led to 2 280 arrests (305 for murder), the seizure of narcotics valuing almost $652.0 million and the recovery of property valuing almost $214.6 million, while approximately $22.3 million has been paid out in rewards.

Transnational Crimes and Narcotics Division

The Transnational Crimes and Narcotics Division (TCND) of JCF is responsible for conducting transnational investigations into the trafficking of drugs, firearms and humans; targeting top tier criminals and their networks; liaising with external and internal partner agencies on transnational matters and border support; and providing oversight and managing the secure disposal of all narcotics seizures islandwide. Under the Cannabis Eradication Programme, 247.3 hectares of marijuana, 1 923 300 seedlings, 285.3 kg of marijuana seeds, 10 754.8 kg of cured marijuana and 64 nurseries were destroyed. Additionally, 30 873.5 kg of cured marijuana and 1 230.2 kg of cocaine were seized (Table 24.10). A number of other items such as motor vehicles, boats and a motorcycle were also seized.

Under the Dangerous Drugs Act 1987, 13 463 arrests (13 383 Jamaicans) were made for breaches. This represented a 23.0 per cent decline compared with 2012. Males made up the majority of those arrested (95.7 per cent locals and 72.5 per cent foreigners). Of the foreigners arrested, 33 were British, 15 American, 10 Canadian and 22 other nationalities. The division made 173 arrests at the country's main access points, namely: Norman Manley International Airport – 119; Donald Sangster International Airport – 50; and seaports – 4. There were 34 cases of ingestion and 13 cases of insertion.

Bureau of Special Investigations

The Bureau of Special Investigations (BSI) conducts investigations into shooting incidents on behalf of the Commissioner of Police. A total of 299 shooting incidents were reported to the BSI and of this number, 209 were fatal shooting incidents and 71 shooting injury incidents. A total of 160 investigations were completed in comparison to 179 in the previous year. Of the cases completed, 114 were fatal shootings, 43 injury incidents and 3 miscellaneous. Fifty case files were sent to the Director of Public Prosecution (DPP) for ruling. These files were for investigations that were completed prior to 2013 but were awaiting a ballistic and/or forensic certificate for submission. At the end of the year, some 300 files were still awaiting certificates. Additionally, rulings on 55 cases previously submitted to the DPP were obtained, of which five were criminal rulings. In addition, 21 criminal rulings were received on files completed by the Independent Commission of Investigations, of which 18 arrests were made.

Anti-Corruption Branch

The Anti-Corruption Branch arrested a total of 109 persons (105 males), of which 65 were police personnel and 44 civilians. Of the police personnel arrested, 47 were from the JCF, 11 from the ISCF and 7 District Constables. Of the total number of persons arrested, 76 were charged (50 police officers). Some 1 184 reports were received with 826 related to corruption. The Branch submitted 59 cases (38 were in relation to acts committed in 2013) to the DPP for ruling. The rulings received were as follows: 37 criminal prosecutions, 26 departmental actions, 7 no action and 2 civil actions. There were 8 convictions, 7 acquittals and 49 cases dismissed. A total of 318 polygraph tests and 204 ethical interviews were conducted. The branch also conducted 206 proactive operations, of which 26 led to the arrest of 51 persons. Some

TABLE 24.10
QUANTITY AND TYPE OF DRUGS SEIZED AND DESTROYED, 2012–2013

TYPE OF DRUG	QUANTITY 2012	2013	REMARKS
MARIJUANA			
Cured (kg)	37 330.0	30 873.5	Seized
Cured (kg)	14 852.0	10 754.8	Destroyed
Plant (hectares)	455.5	247.3	Destroyed
Seedlings (units)	1 570 600.0	1 923 300.0	Destroyed
Seeds (kg)	302.2	285.3	Destroyed
Nurseries (units)	69.0	64	Destroyed
COCAINE (kg)	338.3	1 230.2	Seized
CRACK (kg)	1.4	4.0	Seized
HASH OIL (kg)	42.2	80.9	Seized
HASHISH (kg)	3.0	22.6	Seized
ECSTASY (tablets)	6.0	153	Seized
Clandestine Labs (units)	1.0	0.0	Destroyed

Source: Jamaica Constabulary Force, Transnational Crime and Narcotics Division

122 lectures were held with 10 459 persons (6 679 civilians and 3 780 police officers).

Inspectorate of Constabulary

The Inspectorate of Constabulary (IOC) is the quality assurance arm of the JCF. The IOC analyses matters affecting efficiency and discipline of the JCF, and makes recommendations to address these deficits. In doing so the IOC conducts inspections, visits, and thematic audits of the various divisions and formations within the JCF. During the year, 157 visits, 31 monitoring of spot checks and operations, 9 audits and 7 inspections were conducted.

The Investigation Unit of the IOC conducts investigations into complaints made against police officers. A total of 759 complaints were received, of which 125 did not require a formal investigation and were completed within seven days. The remaining 634 reports required formal investigation and of that number 53 were completed. Some 81 cases reported prior to 2013 were also completed and submitted to either the DPP or the disciplinary committee. The offences reported were divided into two categories namely; professional misconduct and criminal conduct. There were 325 complaints of criminal conduct and 361 complaints of professional misconduct.

The IOC also launched the Compliance Officer Programme geared at improving compliance within the JCF. Under this programme, officers are placed in various divisions and formations and their function is to monitor compliance with force policy. A total of 18 Compliance Officers were trained and assigned.

Training

The JCF and ISCF continued their training and development programmes. There were general training programmes and training by specific units and branches. Some of the areas of specific training were: performance management appraisal; serial number restoration; scenes of crime training; and statement writing for Corporals. Some 300 members of the CSSB and the Chaplaincy Branch were trained as crime prevention officers in domestic violence, while another 533 personnel were trained in the use of less lethal force.

National Security Policy

The National Security Policy Coordination Unit (NSPCU) continued to monitor, coordinate and support the implementation of the National Security Policy for Jamaica (NSP). The review and update of the NSP was completed and approved by Cabinet. The policy ranked all the threats facing Jamaica into one of four categories, based on the probability that the event will happen, and the extent of the harm that it could cause Jamaica. The categories are as follows:

— *Tier 1* – clear and present danger, are therefore top priority that requires an active response. Tier 1 threats include transnational organized crime, gangs and domestic organized crime, corruption, and weaknesses in the judicial system. The revised NSP outlined six key reforms to address Tier 1 threats, namely:

  – Removing the profit from crime
  – Reforming the justice system
  – Policing by consent
  – Adopting a coherent anti-gang strategy
  – Focusing on at-risk individuals and communities
  – Strengthening systems of governance

— *Tier 2* – major potential or imminent threats, rather than present threats. Tier 2 threats require constant monitoring, building early warning systems and strengthening resilience.

— *Tier 3* – persistent but relatively low-impact problems, and are unlikely to pose any major threat. Tier 3 threats require reforms to resolve the problems, such as improving governance, eradicating corruption and building stronger institutions.

— *Tier 4* – potential risks that are currently seen as less probable, and also as having less potential to inflict harm. However, Tier 4 threats require monitoring and periodic review.

A resource directory of security related services was developed by the NSPCU to bring greater awareness to the

range of security services that are available in Jamaica through the public service. The resource directory is a one-stop shop that empowers readers by providing information in order for them to make informed decisions about their safety and well-being, and to contribute to the safety of their community and the country.

National Crime Prevention and Community Safety Strategy

The revised National Crime Prevention and Community Safety Strategy (NCPCSS) was adopted by Cabinet in November with the Public Order Committee replacing the Inter Ministerial Committee on Community Safety and Renewal as the governing body to oversee the implementation of the NCPCSS. As part of the structure, a Joint Technical Working Group on Citizen Security (JTWGCS) was established comprising key ministries, departments and agencies with responsibility for the national coordination of programmes related to the prevention of violence and the promotion of community safety. The JTWGCS is responsible for planning, implementing, monitoring and evaluating a coordinated programme of interventions. This will include setting out desired outcomes, and the identification and mobilization of budgets. Subsequent to the adoption by Cabinet of the Revised Strategy, the Unite for Change (UFC) Programme was launched in late November as the implementation programme of the NCPCSS. The programme intends to mobilize the entire country — individuals, community based organizations (CBOs), non-governmental organizations (NGOs), faith based organizations (FBOs), the private sector and government — in a unified and coordinated approach around the shared goal of violence prevention. The work of the UFC will be in the areas of programme coordination, measurement and communication. The activities that will support UFC will include existing governmental and non-governmental programmes, and new programmes with specific objectives related to crime prevention.

In keeping with the objectives of the NCPCSS, support was provided to the Peace Management Initiative (PMI) to intervene in conflicts and to identify potential conflicts with a view to implementing proactive measures to prevent flare-ups or issues that may destabilize the peace process. The PMI worked in a number of communities in Kingston and St. Andrew, St. Catherine, Clarendon and St. James, and activities undertaken included: hot spot visits and monitoring; mediation and counselling; community walk-throughs; training of parent trainers; educational presentations; and band training for at-risk youths. An alternative pathway was provided for 500 high risk youths in Kingston and St. Andrew, St. Catherine and Clarendon who were involved in gang activity. Support was also provided to undertake activities to promote peace among residents, to assist community members affected by violence, and to facilitate community engagement sessions.

Other key actions undertaken included:

- Conducting an evaluation of the SRO component of the Safe Schools Programme in the last quarter of 2013 to assess the performance and impact of the programme. The survey results will be used to determine the strengths, weaknesses and gaps as well as to guide the development of appropriate plans for the programme.
- Partnering with the National Crime Prevention Fund (NCPF) which manages Crime Stop. This is further in keeping with an MOU signed between the MNS and the NCPF in January.

Partnering with the Ministry of Local Government and Community Development and other key stakeholders to establish and guide the effective functioning of Parish Safety and Security Committees (PSSCs) across Jamaica. These committees have been established in all parishes except St. James, and Kingston and St. Andrew. They seek to bring together key stakeholders under the leadership of the parish council to address issues of crime and violence affecting the respective parishes.

Trafficking In Persons

In its *Trafficking in Persons (TIP) Report 2013*, the US Department of State gave Jamaica a Tier 2 ranking. There are four tiers and Tier 2 is awarded to "Countries whose governments do not fully comply with the Trafficking Victims Protection Act's minimum standards, but are making significant efforts to bring themselves into compliance with those standards."[6] The following amendments were made to the Trafficking in Persons (Prevention, Suppression and Punishment) Act 2007:

- Increased penalties (from 10 to 20 years) for TIP offences especially where other aggravating circumstances exist such as: if drugs are involved; the victim is a minor; and the victim suffered permanent physical and/or mental harm.
- Broadened definition for TIP to include for example debt bondage
- Trial judge now has authority to order that restitution be paid to victims without victims having to take the matter to a Civil Court.
- Improvement in Section 7 of the Act and the first Schedule of the Act that outlines the procedure for forfeiture to make them more consistent with the requirements of the Proceeds of Crime Act 2009.

The JCF TIP Unit conducted investigations for 27 TIP cases (26 were related to sex trafficking and 1 to forced labour). There were 166 operations which led to 7 arrests. The arrests were made under the Sexual Offences Act 2011, the Trafficking in Persons (Prevention, Suppression and Punishment) Act 2007, the Child Care and Protection Act 2004, and the Proceeds of Crime Act 2009. A total of seven cases (includes three from previous years) were before the court for prosecution, while another 31 were still under investigation. Some 14 victims were rescued and 244 persons (includes alleged victims and offenders) interviewed. The Unit also sensitized 5 570 person about TIP.

A number of public education exercises were undertaken to bring awareness to the issue of TIP and include the erection of seven anti-human trafficking billboards in Portmore, Montego Bay, Ocho Rios, Negril and along Barbican Road, Washington Boulevard and Red Hills Road in St. Andrew. International day

6 US State Department http://www.state.gov/j/tip/rls/tiprpt/2013/201548.htm

against Human Trafficking and Sexual Exploitation of Women and Children was observed on September 23. A public forum under the theme "Unite to Fight Human Trafficking" was held on November 26. Topics for the forum included: The Relationship between Child Abuse and Human Trafficking; The Profiles of a Victim and an Offender; Gender, Justice and Human Trafficking; and Prevention and Policy Solutions.

Other Security-related Initiatives

An Advanced Passenger Information System (APIS) to be linked to the Border Management and Control System was implemented by the Passport Immigration and Citizenship Agency. The Jamaica Customs Department became an Executive Agency and this represented the last of the functional reviews of security-related entities that was stipulated in the 2007 edition of the NSP.

- The National Drug Control Master Plan is a five-year strategy (originally 2011–2015) addressing both the supply and demand aspects of the illicit drug phenomenon in Jamaica, as well as institutional strengthening. The Master Plan (now 2013–2017) was finalized and a joint Cabinet Submission made by the Ministries of National Security and Health. Both ministries also collaborated to amend the 2003 draft Precursor Chemicals Regulations, which is essential for the effective implementation of the Precursor Chemicals Act 1999. Precursors and chemicals are frequently used in the illicit manufacture of narcotic drugs and psychotropic substances. The final draft of the Precursor Chemicals Regulations, 2013 was sent to the Office of the Chief Parliamentary Counsel. Additionally, the Terms of Reference for the Precursor Chemicals Committee was approved and the committee met and reviewed the draft Cabinet Submission for the amendment of the Precursor Chemicals Act 1999.
- The MNS also developed a National Small Arms Policy to address the prevalence of guns within the society. Some of the policy recommendations will result in amendments to the Firearms Act.

Social Intervention Programmes

The main social intervention programmes were:

Citizens' Security and Justice Programme

During the year, negotiations were undertaken for the funding of a third phase of the Citizens' Security and Justice Programme (CSJP). Implementation of phase II of the CSJP continued in 50 communities across eight parishes[7]. Under Component 1 – Community Action, the partnership with the Jamaica Defence Force continued with on-the-job training of some 220 youths who were assigned to the Engineering Regiment of the Army. An agreement was signed with the Caribbean Maritime Institute to provide training to 140 persons in the areas of Multipurpose Rating, Industrial Port Security and Heavy Duty Equipment. Vocational skills training was provided for 823 persons (529 males) while pre-vocational skills training (includes remedial education) was provided for 419 persons (222 males). Some 711 persons (279 males) participated in the NGO implemented educational and life skills programmes, 1 817 persons (1 023 males) participated in the PMI programme while another 3 240 persons (746 males) participated in similar programmes, which were managed directly by the Programme Execution Unit (PEU). Tuition support was given to 1 160 students (428 males). Some 276 persons (256 males) benefited from on-the-job training while 117 persons (61 males) were placed in jobs. Summer employment was provided for 271 persons (90 males) and 176 persons (57 males) participated in the employment internship programme. Psychological assessment and counselling/social work services were provided to 788 persons (610 males).

As it relates to situational crime prevention programmes, repairs were done to the Rose Town Computer Lab, the Alwyn Ashley Centre, the Tivoli Gardens Resource Centre Computer Lab and Hospitality Training area, and the Canaan Heights Centre (75.0 per cent complete). A multipurpose centre was being constructed in Parade gardens and Waterhouse (20.0 per cent complete) and the boundary fencing of York Town Primary School completed. Furniture and equipment were provided for the Melrose Primary and Junior High School Home Economics room, and the Farm Heights and Glendevon Centre of Excellence multipurpose centres. Street names were also installed in the communities of Norwood Phase 1 and Greenpond Phase 1 and 2 in Montego Bay, and Canaan Heights in Clarendon.

The community action committees (CACs) are an integral part of the formal community governance mechanism. There are 61 functional CACs in 48 of the 50 CSJP communities and 46 of the 61 CACs were registered as Benevolent Societies. Some 23 CACs received a monthly stipend to cover basic administrative costs. In the area of social marketing, Men with a Message, continued to promote the possibility and benefits of change to at-risk males, and 9 000 youth were targeted. The CSJP partnered with the JCF for two "Safe Schools" concerts and six community sensitization sessions, utilizing the Peace-Mobile Unit. Eleven new CSJP communities were sensitized utilizing the Peace Mobile Unit. Additionally, a total of 5 000 persons were sensitized in Restorative Justice (RJ). Approximately 166 community persons were treated by RJ facilitators who completed a practicum in undertaking RJ sessions. To aid in the administration of the RJ process, a case management electronic system was developed and users trained.

Poverty Reduction Programme II

The Poverty Reduction Programme II continued to provide basic socio-economic services to vulnerable and volatile communities. Implementation of activities is done through the Jamaica Social Investment Fund (JSIF) and the MNS. Over the project duration, repairs were effected to the Hunt's Bay, Allman Town, Cross Roads, Half Way Tree and Matilda's Corner Police stations.

Jamaica Reducing Re-Offending Action Plan

During the period, the Jamaica Reducing Re-offending Action Plan (JRRAP) continued to successfully provide reintegration services to deported migrants and local ex-offenders. Services included reception and transportation, provision of emergency to medium-term accommodation,

7 The parishes are Kingston and St. Andrew, St. Catherine, St. James, Clarendon, Westmoreland, St. Mary and St. Ann.

education and skills training, and entrepreneurial development. The JRRAP also engaged implementing partners in capacity building initiatives in the areas of physical infrastructure development (general renovation and refurbishment); income generation (building of a car wash, cash crop farming and animal rearing); and entrepreneurial development (Apiculture training).

The MNS also identified the need to build awareness among service providers and other key stakeholders about the importance of effective sex offender management to reduce the reoffending rate and potential threat to the general public. In this regard the following activities were undertaken and are expected to continue into the 2014/2015 Financial Year: basic counselling in sex offender management; sensitization programmes to increase resilience against sexual abuse within secondary schools; and monitoring of high risk deported migrants.

Jamaica Crime Observatory - Integrated Crime Violence Information System

The MNS signed an MOU with 18 stakeholders from governmental organizations and private entities to facilitate the exchange of information for the Jamaica Crime Observatory - Integrated Crime Violence Information System (JCO-ICVIS). The JCO-ICVIS also produced several documents that assisted with crime prevention initiatives.

JAMAICA DEFENCE FORCE (JDF)

Personnel

The JDF is presently established to have a Regular Force of 4 906 personnel and a Reserve Force of 1 444. The strength of the Regular Force stood at 3 425 soldiers (196 females), while the strength of the Reserve Force was 446 persons. There were 233 officers (45 females) in the Regular Force and 54 officers in the Reserve Force. Some 342 persons completed recruitment training in 2013, with 10 being commissioned as officers in the Regular Force. There were four deaths during the year. A total of 255 soldiers were discharged with the main reasons being termination of engagement (117), final approval of attestation withheld (53), end of current termination of service (20) and inefficiency during the first six months (12). Some 841 members participated in 127 overseas and 73 local courses. The JDF also embarked on a number of programmes in the area of community development (13), outreach (7), career expositions (254) and nation building (7), impacting 3 317 persons.

The Jamaica Defence Force (JDF) performance indicators are measured against the roles of the organization, which were revised under the Strategic Defence Review (SDR). The review strategically aligned the roles of the organization with the current environmental situation, in order to ensure that the JDF remains current and relevant in an ever-changing global environment. The roles as redefined by the SDR are as follows: defend against external aggressors; internal security operations; support to other government agencies and departments; disaster relief; monitoring and control of airspace and maritime areas of jurisdiction; counter terrorism; search and rescue; peace support; regional cooperation; and state ceremonial duties. The JDF executed several different categories of tasks with respect to its roles over the period of review. These are outlined below:

A. Internal security – The JDF continued to provide support under "Operation Resolve" in the parishes of St. Andrew, Kingston, Clarendon, Manchester, St. James, Westmoreland and Hanover. Operation Resilience 2 (Ops Resilience 2) was launched in September by the JCF to counter gang activities that were identified as the main drivers for the increase in shooting and murders. "Ops Resilience 2" had no restricted boundaries for areas of operation and encompasses the entire country, however JDF support was mainly in police areas 1, 3 and 4. There were 9 045 joint patrols (foot and mobile), 1 642 vehicle check points, 534 anti-gang snap raids/special operations, and 182 cordon and search. Other intelligence led operations resulted in the seizure of 97 assorted weapons, 2 776 assorted rounds of ammunition and 65 assorted magazines.

B. Support to other government agencies and departments – The JDF assisted several government agencies and departments over the period of review. These included: monitoring four remandees at the Horizon Adult Remand Centre until July 2013; managing/undertaking a number of internal and external construction and refurbishment projects, such as the painting of the Clan Carthy Primary School; providing 234 secondary and tertiary level students with work experience; and assisting 360 inner-city youth by providing employment and skills training under the CSJPII. The JDF Air Wing (AW) also conducted 311 CASEVAC operations for the Ministry of Health, 24 cases of air support for the JCF, 99 VIP missions, and 9 flights for other external organizations.

C. Monitoring and control of airspace and maritime areas of jurisdiction – This was primarily achieved through the deployment of the JDF Coast Guard (CG) to conduct regular patrols of the country's maritime areas of jurisdiction. The following are the results:

- 510 Maritime Patrols: 2 fishing vessels and US$32 800.00 seized, and 7 instances of marine pollution
- 501 Narcotics Interdiction: 450kg of marijuana seized
- 462 Fisheries Patrols
- 183 Dive operations in Jamaican ports
- 1 109 Boardings

D. Search and rescue – The JDF AW and JDF CG are the main units of the Force that deploy personnel to undertake such activities. There were three air searches and 44 sea searches, which resulted in 180 lives being saved.

PRIVATE SECURITY REGULATION AUTHORITY

The Private Security Regulation Authority (PSRA) continued to ensure that private security companies followed established guidelines for the provision of service. There was the continued implementation of the Electronic Archiving System aimed at the transfer from a paper-based retrieval system for security guards/companies to an electronic system. Thirty-five new security companies were registered, bringing the total to 328 registered security companies. In addition, 1 671 new guards were registered. The total number of registered guards stood at 20 512, with 71.7 per cent being male.

DEPARTMENT OF CORRECTIONAL SERVICES (DCS)

Personnel

The strength of the DCS stood at 2 444, with 2 302 Correctional Officers and 142 Probation Officers. The DCS lost 69 members: 43 retired and 26 resigned. Some 881 members of staff participated in formal training activities. This

TABLE 24.11
TOTAL ADMISSIONS TO ADULT CORRECTIONAL INSTITUTIONS BY OFFENCE, AGE AND SEX, 2013

OFFENCE	under 17	17-20	21-25	26-30	31-35	36-40	41-45	Over 46	Total Male	Total Female	Total
Murder/Manslaughter	0	10	8	17	5	3	5	8	**54**	**2**	**56**
Unlawful wounding/wounding with intent	0	18	46	41	29	22	23	28	**189**	**18**	**207**
Sexual Offences	0	8	11	30	15	24	13	17	**117**	**1**	**118**
Offences Against the Person	0	12	32	24	16	20	17	15	**123**	**13**	**136**
Robbery/Robbery with aggravation/Burglary	0	26	27	24	16	5	4	2	**103**	**1**	**104**
Illegal possession of firearm/ammunition	0	27	28	25	20	8	5	6	**116**	**3**	**119**
Shooting with Intent	0	2	7	5	4	0	1	1	**20**	**0**	**20**
Larceny/Larceny of Motor Vehicle	0	61	87	76	64	48	49	70	**442**	**13**	**455**
Forgery, Fraud, Embezzlement	0	2	4	22	15	23	16	26	**89**	**19**	**108**
Unlawful Possession of/receiving stolen property	0	7	10	16	20	8	5	5	**71**	**0**	**71**
Breaches of the Dangerous Drug Act	0	7	50	45	41	38	36	55	**223**	**49**	**272**
Minor/Other Offences	0	17	29	34	22	16	22	36	**159**	**17**	**176**
Traffic Offences	0	7	18	24	17	16	14	37	**133**	**0**	**133**
Total	**0**	**204**	**357**	**383**	**284**	**231**	**210**	**306**	**1 839**	**136**	**1 975**

Source: Department of Correctional Services

included 26 Correctional Officers who participated in riot training which was facilitated by the Embassy of the United States Kingston, Jamaica and another 43 Correctional Officers who participated in skills-at-arm training.

Custodial and Non-custodial Clients

The adult custodial population as at December 31 was 3 330, which is a 3.5 per cent reduction compared with 2012. Nonetheless, the Tower Street and St. Catherine Adult Correctional Centres continued to operate at 94.6 per cent and 39.6 per cent above capacity[8], respectively. A total of 1 975 persons (93.1 per cent male) were incarcerated compared with 1 926 in 2012[9]. Of the total admissions, 23.0 per cent was for larceny/larceny of motor vehicle; 13.8 per cent for breaches of the Dangerous Drugs Act 1975; 10.5 per cent for wounding; 8.9 per cent for minor/other offences; and 6.7 per cent for traffic offences. The main crime for which females were admitted (36.0 per cent) was for breaches of the Dangerous Drugs Act 1975, while the majority of males admitted (24.0 per cent) was for larceny, breaches of the Dangerous Drugs Act 1975 (12.1 per cent) and wounding (10.3 per cent) {Table 24.11}. Of the 1 975 admitted during the year, 805 were still awaiting sentencing at the end of the year.

Of all admissions, 1 425 persons (1 301 males) were new and 550 (538 males) were recidivists. Jamaicans accounted for 97.4 per cent of those admitted followed by British Nationals at 1.2 per cent and Haitians at 0.3 per cent. Most (64.6 per cent) of the new persons admitted were sent to the St. Catherine Adult Correctional Centre (SCACC). The number of new admissions under 31 years of age was 53.6 per cent, down from 54.8 per cent in 2012 (Table 24.12). As with previous years, the largest number of new admissions came from the 21–25 and 26–30 age groups. In relation to repeat offenders, there were 17 less than in 2012 (Table 24.13). Approximately 71.1 per cent of recidivists were sent to SCACC and some 25.6 per cent was in the 46 and over age group (Figure 24E). First-time re-offenders accounted for 51.5 per cent of recidivists, 16.7 per cent re-offended twice, 15.1 per cent re-offended three times, 14.5 per cent re-offended at least four times and 2.2 per cent was unknown. The recidivism rate was 27.8 per cent.

TABLE 24. 12
TOTAL NEW ADMISSIONS TO ADULT CORRECTIONAL CENTRES BY AGE, 2013

AGE	Tower Street ACC	St. Catherine ACC	Fort Augusta ACC	Total
Under 17	0	0	0	**0**
17-20	45	131	6	**182**
21-25	80	188	21	**289**
26-30	82	183	28	**293**
31-35	61	129	20	**210**
36-40	46	107	15	**168**
41-45	33	71	14	**118**
46 & over	34	111	20	**165**
Total	**381**	**920**	**124**	**1 425**

Source: Department of Correctional Services

8 Maximum capacity for the Tower Street and St. Catherine Adult Correctional Centres is 850 persons each.

9 The total number of persons admitted includes new admissions and recidivists (repeat offenders).

TABLE 24.13
NUMBER OF RECIDIVISTS ADMITTED TO ADULT INSTITUTIONS BY SEX, 2009–2013

	YEAR				
SEX	**2009**	**2010**	**2011**	**2012**	**2013**
Males	444	500	490	552	538
Females	16	26	10	15	12
TOTAL	**460**	**526**	**500**	**567**	**550**

Source: Department of Correctional Services

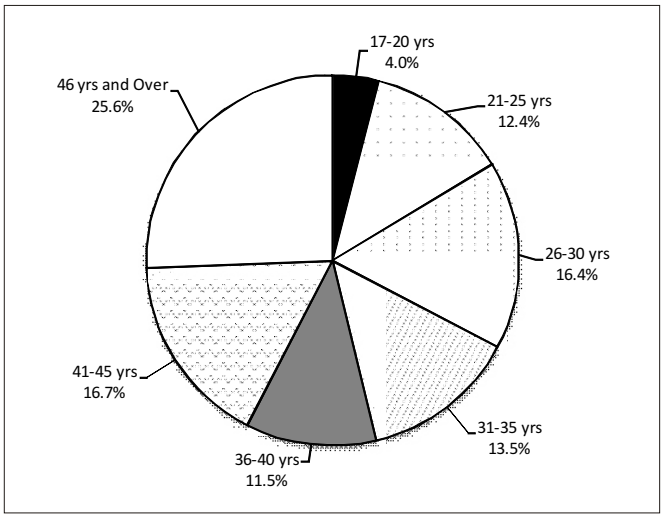

FIGURE 24E: AGE GROUP OF RECIDIVISTS TO ADULT CORRECTIONAL CENTRES, 2013

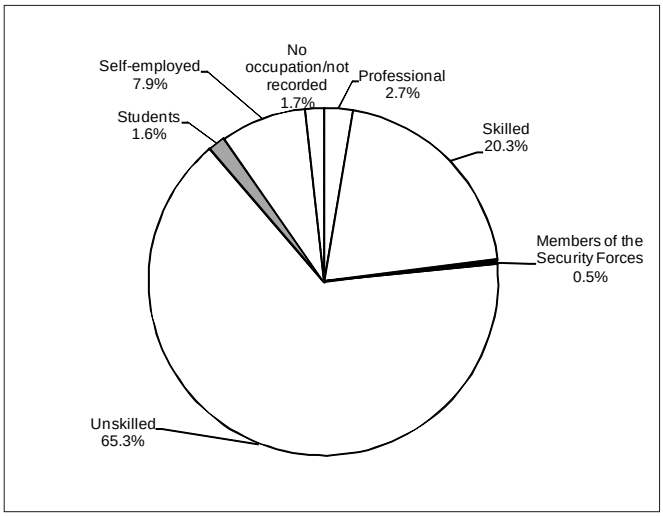

FIGURE 24F: OCCUPATIONAL STATUS OF NEW ADMISSIONS TO CORRECTIONAL CENTRES, 2013

Of the total number of persons admitted, 38.9 per cent was unskilled. A total of 10 persons were members of the security services (police officers, soldiers and security guards) and another 31 were students (Figure 24F). Additionally, of the 1 062 persons incarcerated, 31.9 per cent was involved in training/work programmes, 28.2 per cent was involved in miscellaneous activities while the remaining 39.9 per cent was not engaged. Some 83 inmates sat the 2013 Jamaica School Certificate examination. The pass rate for Mathematics was 52.1 per cent; English Language, 55.9 per cent; Civics, 88.1 per cent; and General Science, 69.3 per cent. Some 14 inmates and 33 wards sat the Caribbean Secondary Education Certificate (CSEC) Examination in 2013, while 37 inmates and 26 wards have been registered to sit the CSEC examinations in May/June 2014.

The juvenile custodial population at the end of December was 282 (237 males). Of this number, 173 were on correctional orders and the remaining 109 on remand (Table 24.14). The South Camp Juvenile Correctional Centre became operational and was being used to house the females formerly located at the Fort Augusta Adult Correctional Centre. A total of 98 youth (83 males) were admitted to the island's juvenile institutions (Table 24.15). Most were admitted for larceny/shop/house breaking (26.5 per cent), followed by wounding (11.2 per cent), uncontrollable behaviour (9.2 per cent), and Breaches of the Dangerous Drugs Act 1975 (7.1 per cent each).

The number of juveniles appearing before the courts was 2 850 (72.4 per cent male) compared with 4 040 in 2012 (Table 24.16). Approximately 25.2 per cent was for care and protection/child abandonment and 10.5 per cent for uncontrollable behaviour. Others committed offences such as "wounding/assault/assault occasioning bodily harm" (21.6 per cent), "dangerous drugs" (20.0 per cent) and "robbery/robbery with aggravation/burglary/larceny/break-in" (7.5 per cent).

TABLE 24.14
POPULATION FIGURES OF JUVENILE INSTITUTIONS AS AT DECEMBER 31, 2013

INSTITUTION	REMAND	SENTENCED
Hill Top Juvenile Correctional Centre	0	55
Rio Cobre Juvenile Correctional Centre	0	79
Diamond Crest (Armadale JCC)	0	0
Horizon Adult Remand Centre (Male)	10	0
Horizon Adult Remand Centre (Female)	0	0
Fort Augusta Adult Correctional Centre	0	0
Metcalfe Street Secure Juvenile Centre	89	4
South Camp Juvenile Correctional Centre	10	35
TOTAL	**109**	**173**

Source: Department of Correctional Services

TABLE 24.15
ADMISSION TO JUVENILE INSTITUTIONS BY AGE, SEX AND OFFENCE, 2013

OFFENCE	13 years	14 years	15 years	16 years	17 years	Total Male	Total Female	Grand Total
Murder/Manslaughter	0	1	1	1	2	**2**	**3**	**5**
Wounding	0	2	3	4	2	**10**	**1**	**11**
Possession of Offensive Weapon	0	0	0	1	0	**1**	**0**	**1**
Shop/House Breaking/Larceny	1	4	7	9	5	**25**	**1**	**26**
Breach of Supervision Order	0	1	0	0	0	**0**	**1**	**1**
Breach of Probation Order	0	0	2	1	3	**6**	**0**	**6**
Dangerous Drug	0	1	0	1	5	**6**	**1**	**7**
Assault/Assualt occasioning bodily harm	0	0	1	2	3	**4**	**2**	**6**
Sexual Offences	0	1	0	1	2	**4**	**0**	**4**
Malicious Destruction of Property	0	0	1	1	0	**2**	**0**	**2**
Burglary/Robbery	0	0	0	1	5	**6**	**0**	**6**
Illegal Possession of Firearm	0	0	0	3	3	**6**	**0**	**6**
Uncontrollable Behaviour	2	2	0	4	1	**5**	**4**	**9**
Breach of Fit Person Order	0	0	0	0	1	**0**	**1**	**1**
Care and Protection	0	0	0	0	0	**0**	**0**	**0**
Escaping Custody	0	0	0	0	1	**1**	**0**	**1**
Unlawful Possession/Receiving Stolen Property	0	0	0	0	3	**3**	**0**	**3**
Others	1	1	1	0	0	**2**	**1**	**3**
Total	**4**	**13**	**16**	**31**	**34**	**83**	**15**	**98**

Source: Department of Correctional Services

TABLE 24.16
REASONS JUVENILES APPEARED BEFORE THE COURT, 2011–2013

MAIN CATEGORIES	2011		2012		2013	
OFFENCE	M	F	M	F	M	F
Murder/Manslaughter	6	1	7	1	6	0
Carnal Abuse/Rape/Indecent Assault/Buggery	112	2	175	8	185	3
Robbery/Robbery with Aggravation/Burglary/Larceny/Break-in	215	17	343	27	204	10
False pretences/Fradulent conversion/Forgery	4	0	4	0	5	1
Unlawful Possession/Receiving stolen property	34	2	21	0	41	3
Wounding/Assault/Assault occasioning bodily harm	470	139	725	189	468	146
Dangerous Drugs	530	13	553	24	311	14
Breaking Firearm Law/Armed with offensive weapon/Shooting with intent	343	29	276[a]	24	160	20
Arson/Malicious destruction	51	15	73	12	60	11
Breaking Road Traffic Law	53	8	36	2	57	2
Minor and other offences[b]	69	24	264	51	63	28
ORDER						
Breach of Probation Order/Variation Order/Supervision Order	30	17	17	21	24	13
OTHER						
Care and Protection/Child Abandonment/	386	498	349	478	328	390
Uncontrollable Behaviour/Disorderly conduct	223	278	174	186	150	147
GRAND TOTAL	**2 526**	**1 043**	**3 017**	**1 023**	**2 062**	**788**

a - figures for 2010 do not include shooting with intent
b - includes suspected persons, bestiality and gambling

Source: Department of Correctional Services

Community Services

The Community Services Arm of the DCS provides specialized services through its Probation After-care Officers to persons sentenced by the courts and to voluntary/walk-in clients. Community Services continued to supervise persons on Court issued orders such as: Probation Order; Supervision Order; Community Service Order; and Correctional Order. There were 4 035 new non-custodial cases (3 017 adults and 1 018 juveniles). Approximately 84.6 per cent of the clients were male. Of all new cases, 41.5 per cent was for Probation Orders; 42.6 per cent was adults on Community Service Orders; and 9.2 per cent was adults on Suspended Sentence Supervision Order (Table 24.17). A total of 4 350 non-custodial cases were completed during the year; 3 049 satisfactorily and 1 301 unsatisfactorily. The number of persons voluntarily seeking assistance from the Community Services section of the DCS decreased by 24.8 per cent to 2 305 (Table 24.18). The main reasons for seeking assistance remained the same: Uncontrollable Child (20.9 per cent); Unsatisfactory

TABLE 24.17
NON-CUSTODIAL SENTENCES BY PARISH AND SEX (NEW CASES), 2013

	Probation				Supervision Order		Community Service Order		Correctional Order		Suspended Sentence Sup. Order		Parole	Other [a]		Grand Total
	Juveniles		Adults		Juveniles		Adults		Juveniles		Adults		Adults	Juveniles /Adults		
	M	F	M	F	M	F	M	F	M	F	M	F	M	M	F	
Family Court	129	39	0	0	12	3	5	1	16	2	0	0	0	16	4	**227**
Lockett Avenue	1	1	142	40	0	0	110	61	0	0	43	11	12	0	0	**421**
Portmore	17	3	24	7	0	1	121	5	6	6	6	2	1	1	0	**200**
St. Catherine	54	15	55	20	0	0	111	25	15	9	20	3	8	1	0	**336**
Clarendon	47	11	80	21	0	0	379	22	5	-	26	9	5	0	1	**606**
Manchester	29	7	51	9	1	0	245	17	5	2	34	7	1	8	0	**416**
St. Elizabeth	20	4	77	14	5	0	101	6	1	3	21	2	2	1	0	**257**
Westmoreland	72	11	46	7	2	0	33	5	14	4	16	5	3	0	0	**218**
Hanover	39	4	15	2	5	4	87	13	4	5	6	4	2	0	0	**190**
St. James Family Court	90	21	4	2	5	1	0	0	13	2	4	0	0	2	0	**144**
Barnett Street	1	0	29	6	0	0	35	6	0	0	15	2	4	1	0	**99**
Trelawny	28	9	65	21	0	0	88	6	1	3	18	1	0	0	0	**240**
St. Ann	49	4	32	8	11	3	30	10	3	2	19	2	2	0	0	**175**
St. Mary	24	1	16	2	7	3	48	12	1	0	24	2	2	2	0	**144**
Portland	27	1	23	2	6	0	56	1	0	0	20	.	3	0	0	**139**
St. Thomas	36	12	45	13	0	0	73	5	0	0	36	11	0	1	1	**223**
Total	**663**	**133**	**704**	**174**	**54**	**15**	**1 522**	**195**	**84**	**38**	**308**	**61**	**45**	**33**	**6**	**4 035**

a - includes voluntary supervision/aftercare, state supervision, aftercare/juvenile and adult institutions and licence for adult and juvenile

Source: Department of Correctional Services

TABLE 24.18
PERSONS SEEKING ASSISTANCE, 2009–2013

Nature of Case	2009	2010	2011	2012	2013
Uncontrollable Child	1 691	1 062	855	583	481
Absent Parent/Guardian	202	146	77	75	36
Parent/Guardian's Incapacitation	131	130	69	25	37
Unsatisfactory Behaviour of Parent/Guardian	1 130	988	729	504	417
Malfunctioning Family	982	855	440	475	337
Legal Assistance	181	119	61	96	57
Multiple	214	298	236	115	105
Other	1 846	1 558	1 000	1 190	835
Grand Total	**6 377**	**5 156**	**3 467**	**3 063**	**2 305**

Source: Department of Correctional Services

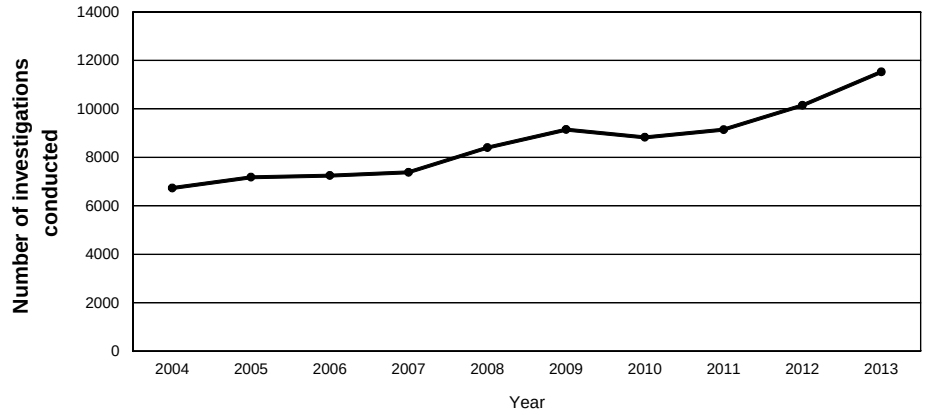

FIGURE 24G: NUMBER OF CASES INVESTIGATED BY PROBATION OFFICERS, 2003–2012

Behaviour of Parent/Guardian (18.1 per cent) and Malfunctioning Families (14.7 per cent). However, "Other" remained the largest category with 36.3 per cent. The number of investigations conducted by Probation After-care Officers increased by 13.7 per cent to 11 524 (Figure 24G).

INITIATIVES

A number of initiatives were undertaken in the rehabilitation of both juvenile and adult offenders. These included:

- Relocation of female wards from Diamond Crest Juvenile Correctional Centre and Fort Augusta to the South Camp Juvenile Correctional/Remand Centre in early September
- Sensitization of the inmate population on issues such as human rights, justice reform and HIV/AIDS via the Prison Radio, FREE FM 88.9 and internet radio.
- Receipt and processing of 41 applications for Rehabilitation Grants. Some 35 payments in the sum of $633 779.00 were made.
- Training of staff and sensitization of wards at all juvenile institutions in suicide and self-harm in response to an increase in the incidents of attempted suicide/self-harm. A suicide/self-harm policy was also developed.
- Training of 28 teachers and instructors in the Multi-Sensory Approach to teaching and Principles of Good Instructing in conjunction with the Ministry of Education
- Conducting of 315 interventions and 3 850 individual counselling sessions that included one-to-one counselling sessions with 1 007 new admissions
- Commencement of activities for the expansion of the agricultural project at the former Diamond Crest facility and at New Broughton Sunset facility to supplement the dietary needs of inmates and wards
- Reclassification of the 565 inmates for lower security risk institutions and the subsequent transfer of 462 of these inmates
- Conducting of fire drills in all institutions in consultation with the Jamaica Fire Department to promote inmate safety
- Commencement of construction of additional classrooms at Tower Street Adult Correctional Centre to accommodate 200 inmates under Phase 2 of the JRRAP
- Provision of medical and dental services to the inmates and staff at Fort Augusta, St. Catherine and Tower Street Adult Correctional Centres and Rio Cobre Juvenile Correctional Centre by two medical missions.

JUSTICE

The Courts

With 1 366 appeals carried forward from previous years and 155 new appeals filed, the total caseload heard by the **Court of Appeal** was 1 521 (Table 24.19). Of this, 57.0 per cent was related to civil matters and 42.9 per cent criminal matters. A total of 1 350 cases (1 225 traversed and 125 new) originated from the Supreme Court and 171 cases (141 brought forward and 30 new) originated from the Resident Magistrates (RM) Court. Of the 1 521 cases listed, 168 cases (11.0 per cent) were disposed. Some 82.7 per cent of appeals disposed originated in the Supreme Court, while 17.3 per cent of matters were from the RM Court. At the end of the year, 1 353 appeals remained pending.

In total, 803 cases[10] were filed in the **Criminal Division** of the **Supreme Court**, of which 323 (40.2 per cent) were disposed (Table 24.20). St. Catherine Parish Circuit was the parish with the most cases filed, 157 (19.6 per cent), and the least, 26 (3.2 per cent), was filed in the parish of Trelawny. That parish also had the highest case disposal rate, 76.9 per cent. The lowest case disposal rate (21.3 per cent) was in the Manchester

TABLE 24.19
CASES IN THE COURT OF APPEAL, 2013

	Supreme Court			Resident Magistrate			Total
Category	**Civil**	**Criminal**	**Miscellaneous**	**Civil**	**Criminal**	**Miscellaneous**	
Pending Cases as at December 2012	755	470	0	33	107	1	1 366
New Cases Filed	61	63	1	18	12	0	155
Total Cases Listed	816	533	1	51	119	1	1 521
Disposal of New Cases Filed	6	4	0	1	0	0	11
Disposal of Pending Cases	69	60	0	8	19	1	157
Total Cases Disposed	75	64	0	9	19	1	168
Cases Pending at December 2013	741	469	1	42	100	0	1 353

Note: Does not include cases for the Michealmas Term

Source: Ministry of Justice, Court Statistics

10 There was no data available for the Home Circuit Court.

TABLE 24.20
NUMBER OF CRIMINAL CASES FILED AND DISPOSED IN THE SUPREME COURT BY PARISH, 2013

PARISH	TOTAL FILED	DISPOSED
Home Circuit	-	-
St. Thomas	73	32
Portland	54	22
St. Mary	50	23
St. Ann	88	27
Hanover	43	20
Trelawny	26	20
St. James	47	24
Westmoreland	56	18
St. Elizabeth	50	15
Manchester	47	10
Clarendon	112	44
St. Catherine	157	71
TOTAL	**803**	**323**

Note: No data were available for the Home Circuit Court

Source: Ministry of Justice, Court Statistics

Circuit Court. The total number of cases pending at the end of the year was 480.

Cases listed for hearing in the island's **Resident Magistrate (RM) Courts** during the year was 561 819 (Table 24.21). Of this number, 75.7 per cent (425 389 cases) was filed during the period under review. The majority of the cases listed for hearing (87.0 per cent) was related to criminal matters. The high number of traffic cases also contributed to the overall increase in the number of new criminal cases listed. Approximately 42.0 per cent of criminal cases and 69.1 per cent of civil cases were disposed. The **Family Courts** heard 22 523 matters. Most of the matters heard related to Maintenance (46.7 per cent), while the least number of matters heard (0.2 per cent) related to adoption issues. Overall, the disposal rate at the island's RM Courts was 46.2 per cent. The parish of St. Mary had the highest case disposal rate (88.8 per cent), while St. Catherine continued to be the parish with the lowest disposal rate (28.8 per cent). A total of 302 142 cases, including a number of traffic matters (76.3 per cent), remained pending at the end of the year. In the **Gun Court Division of the Corporate Area RM Court**, of the 279 cases listed for hearing, 160 (57.3 per cent) were brought forward from previous years. A total of 61 cases were disposed of, which included: 32 "Committed to Circuit Court" and 18 by "Voluntary Bill". At the end of the year, the number of cases carried forward was 218.

The **Night Court** continued to assist in clearing the case backlog. A total of 40 661 cases were filed for the period, of which 23 879 (58.7 per cent) were disposed. St. Ann was the parish with the largest number of cases (11 077) filed and St.

TABLE 24.21
CASES IN THE RESIDENT MAGISTRATES' COURT, 2013

	Brought Forward	Cases Filed	Total Cases Set for Trial	Disposed of	Pending
Criminal					
Preliminary Exams	6 659	6 141	12 800	4 265	8 535
Indictment	16 928	26 716	43 644	23 836	19 808
RM Summary	9 493	34 238	43 731	32 903	10 828
Petty Sessions	8 429	16 551	24 980	19 439	5 541
Traffic	71 650	280 512	352 162	121 567	230 595
Tax Cases	7 632	4 302	11 934	3 666	8 268
Sub total	**120 791**	**368 460**	**489 251**	**205 676**	**283 575**
Civil					
Plaints	9 671	25 820	35 491	24 945	10 546
Family	1 070	5 348	6 418	3 934	2 484
Judgement Summons	1 073	4 974	6 047	4 596	1 451
Probates and Administration	536	383	919	311	608
Sub total	**12 350**	**36 525**	**48 875**	**33 786**	**15 089**
Coroners	**699**	**471**	**1 170**	**448**	**722**
Western Family Court	2 144	6 765	8 909	7 215	1 694
Kingston Family Court	446	13 168	13 614	12 552	1 062
Grand Total Cases	**136 430**	**425 389**	**561 818**	**259 677**	**302 142**

Source: Ministry of Justice, Court Statistics

Catherine the least (1 482). Westmoreland had the highest disposal rate (72.9 per cent), while Manchester had the lowest (34.0 per cent).

JUSTICE SECTOR REFORM

Vision 2030 Jamaica presents the primary backdrop against which the ministry's priority actions are implemented. Justice sector reform is one of the two strategies of the national priority outcome for Effective Governance in Jamaica. The reform of Jamaica's justice system continued to be the overarching priority of the Ministry of Justice. During the year, a number of activities were undertaken in several areas, which included.

1. Justice Undertakings for Social Transformation (JUST) programme – this four-year programme is being administered by the MOJ to strengthen justice sector institutions in Jamaica through institutional strengthening, technical–legal assistance and social order. Key activities and achievements undertaken included:

   – a consultancy on reclassification and decriminalization of minor offences in order to develop alternatives to the criminal law, to deal with undesirable behaviour and crimes that could be considered for decriminalization as a strategy for reducing backlog in the courts

   – a review of the role of Justices of the Peace (JPs) in Jamaica and recommendations being made with regards to the expansion of their functions as Lay Magistrates

   – a review of the court-based automatic mediation process and the preparation of a report which included recommendations for the expansion and improvement of automatic mediation in the civil courts

   – a review and revision of monetary fines and penalties with a view to systematically updating monetary fines and penalties to bring them in line with current economic realities

   – an organizational review of the Victim Support Unit (VSU) with the reclassification and new organizational structure approved by the Ministry of Finance and Planning

   – the development of a disclosure protocol for prosecutors in the Office of the Director of Public Prosecutions

   – -the development of a communications strategy and implementation plan for building awareness of justice reform issues among the public sector, court users and civil society

   – a review of the structure and governance of the Court Management Services to bring the organization in line with the government intention to have a structured administrative arm giving support to the judiciary and the courts

   – the development of a position paper on Jury Reform to address deficiencies identified in the jury system

   – the development of a Citizens' Scorecard to be used to assess the impact of the justice reform agenda

   – the development of a draft organizational structure for the single anti-corruption agency.

2. Establishing a Sound Court Infrastructure – Phase 1 of Justice Square was completed and a new contract for Phase II was awarded. Repairs were also done to the Morant Bay and Black River RM Courts, the Office of the DPP, VSU Head Office, the Supreme Court, and Court of Appeal. There was also the undertaking of a project to improve public facilities in various courthouses islandwide. In Montego Bay, a registry was constructed for the Supreme Court and the Legal Aid Office. Work commenced on a property at 2 Hagley Park Road that will house the Ministry, and the Traffic and Coroner's Courts.

3. Restorative Justice and the National Plan of Action for Child Justice – Implementation of the Restorative Justice (RJ) programme continued in 11 communities namely, Tower Hill and August Town, St. Andrew; Trench Town and Nannyville Gardens, Kingston; Homestead, Ellerslie and March Pen, St. Catherine; Canaan Heights and Effortville, Clarendon; Granville, St. James; and Russia, Westmoreland. Seven Restorative Justice centres were operationalized in May Pen, Spanish Town, Trench Town, August Town, Tower Hill, St. James, and Savanna-La-Mar. Training was provided for a core of 80 RJ facilitators — there are 144 Restorative Justice Facilitators islandwide. The RJ Case Management System was developed and facilitators subsequently trained in the use of this system. The RJ Unit held 166 community sensitization sessions with 4 317 persons across the target communities. National level training in the Restorative Justice Programme and Case Management System were held with the Judiciary; Resident Magistrates; Crown Counsels; Clerks of Court and Deputy Clerks of Court; Probation and After Care Officers; and Police Officers.

   – Implementation of the National Plan of Action for Child Justice 2010–2014 commenced during the period under review. A National Child Diversion Policy was drafted and four public consultations held to review it. Two key stakeholder consultations were also held with the police and children. Assessment of the Family Court Attendance Centre commenced, to facilitate the revamping of the curriculum to support the National Child Diversion Programme. Additionally, 40 Restorative Justice Facilitators were trained in Child Rights and Responsibilities to support the implementation of the National Child Diversion Programme.

4. Management Information Systems (MIS) – a total of 21 real-time steno writer machines, 35 desktop computers and two servers were distributed to the courts. The Prosecuting Attorney System (PAS) was implemented at the Office of the DPP and just over 300 cases entered. Work also began on a process of linking the Supreme Court in Kingston to the newly established Montego Bay Supreme Court Registry.

Court Management Services (CMS)

The Court Management Services (CMS) agency undertook a number of activities to support the reform of the justice system. These included:

- *Strengthening the judicial and support workforce* – Recommendations were submitted to the Ministry of Finance and Planning for the establishment and operation of posts of Judicial Clerks and Case Progression Officers to support the work of the Supreme and RM Courts, and for a review of the classification of Court Administrators. Recruitment commenced for 10 new positions of Judicial Clerks.
- *Information, Communication and Technology (ICT) Infrastructure upgrade and maintenance* – One of the strategic objectives of the CMS during the year was the provision of a state-of-the-art ICT infrastructure in the three busiest RM Courts (Corporate Area, St. Catherine and St. James RM Courts). The infrastructure upgrade for these courts was completed and they will be the first to be rolled out on the wide area network. The CMS also upgraded the St. Ann and Clarendon RM Courts as a priority for case management. Two software systems were also developed namely, Customer Complaints Log designed to manage clients complaints and ProTracS designed to track the procurement of items requested by the courts. Work was also done on the Court of Appeal and Supreme and RM Courts' websites.
- In the area of *court support services and strategic planning*, translation/interpretation services were provided for 35 cases. The Records Management Project was being piloted in the Portland RM court. This project makes provisions for a standardized file management process and numbering system. It also includes the introduction of a flat file system to reduce the number of files lost or misplaced and facilitate the introduction of a proper method of dealing with disposed case files. Implementation of the Automate manual data collection process in the RM Courts commenced in the Corporate Area Criminal Court.
- The *Customer Service* Charter was established and suggestion boxes installed in all the courts. A toll free line was also installed in December. Additionally, brochures and articles were published to inform members of the public on filing claims, serving as jurors, the explanation of common court jargon and filing a divorce petition. The Chief Justice's Annual Review Forum was held in September and the focus of the review was the treatment of children in conflict with the law. Stakeholders made recommendations on options for dealing with children brought before the courts and received information on initiatives currently being undertakenby the courts, the Justice Ministry and other relevant government departments to address this matter.
- The *Building and Property Management* Division reviewed and managed service contracts and effected general repairs to court buildings as requested.

OTHER ACTIVITIES

During the period, the **Justice Training Institute** conducted 10 training sessions. Training programmes included: anti-corruption training; qualifying and specialized training for JPs; Diploma in Paralegal Studies; and orientation of High Court Judges. Fifteen JP qualifying training sessions were held in the various parishes with a total of 569 persons trained, while two JP specialized training sessions were held with a total of 49 persons trained. Twelve persons participated in the Diploma for Paralegal Studies programme and another 12 persons in the Court Reporting training programme. Some 114 persons consisting of High Court Judges, Masters-in Chambers, Registrars, Judicial Clerks, Resident Magistrates, Prosecutors and Clerks of Courts received training in anti-corruption.

The major activities of the **Law Revision Secretariat** focused on consolidating the Laws of Jamaica to publish the Revised Laws of Jamaica. During the year, four revision exercises were undertaken and three were completed. These included the consolidation of the 2010 and 2011 Statutes, the 2010 and 2011 Subsidiary Legislation and the 2012 Statutes. The 2012 Subsidiary Legislation was being finalized. Another major achievement was completing the typesetting of the Guide to the Subsidiary Legislation which is a comprehensive index of all legislation that has ever been passed in the country.

The **Legal Aid Council** functions primarily to fulfil the directives of the Legal Aid Act by providing and administering an efficient legal aid system, thus ensuring improved public access to justice. Some 3 726 persons received full representation via the Kingston Legal Aid Clinic. A total of 513 legal aid matters were completed in the RM Court, 273 in the Gun Court, 389 in the Circuit Court and 31 in the Court of Appeal. Duty Counsel assignments during the period resulted in 2 520 persons in police custody obtaining legal representation, including question and answer sessions, identification parades, bail applications and filing of Habeas Corpus Writs. Attorneys empanelled to the Council as at December 31, 2013 numbered 414, of which 385 practised criminal law. Additionally, the relocation of the Montego Bay Legal Aid Clinic was completed during the year.

The **Office of the Trustee in Bankruptcy** is mandated to administer the affairs of insolvent persons and companies in accordance with the provisions of the Bankruptcy Act and the Companies Act. There were 15 new cases of bankruptcy orders on debtors' petitions during the year. Dividend payments of just under $134.0 million were made in relation to these estates and companies, from which 127 creditors benefited and a contribution of over $10.0 million was made to the Consolidated Fund. The Trustee was also involved in reviewing the existing legislation and preparing a report on proposed changes to both the existing Bankruptcy and Companies' Acts. Additionally, the Insolvency Bill produced by the Insolvency Review Committee, of which the Trustee was a part, was reviewed, approved and tabled in the Senate in December 2013.

The **Criminal and Civil Justice Administration Division** processed 9 846 Minister's (Marriage) Licence applications, of which 79 were carried forward from the previous year contributing approximately $39.4 million in Stamp Duty to the Consolidated Fund. Some 9 621 licences were processed, 155 were returned for corrections and 77 were carried forward to 2014. The Criminal Records (Rehabilitation of Offenders)

Board reviewed 2 085 applications for expungement. Of this number, 1 158 were new applications, while the other 927 were for final decisions. Of the 927 submitted for final decisions, 708 were approved, 69 returned for ineligibility/incompleteness/additional information, 96 deferred to another date and 54 applications were rejected or refused by the Board. A total of 482 (266 males) new JPs were commissioned bringing the complement of JPs islandwide to 6 134.

LEGISLATIVE PROGRAMME

The MOJ continued its work on several pieces of legislation as part of its legislative programme (Appendix 24A). The legislation enacted or amended is as follows:

Enacted and Amended Legislation

- The Defamation Act
- The Law Reform (Flogging and Whipping) (Abolition) Act
- The Charitable Organizations (Tax Harmonization) (Miscellaneous Provisions) Act
- The Law Reform (Fraudulent Transactions) (Special Provisions) Act
- Financial Investigations Division (Amendment) Act
- Trafficking in Persons (Prevention, Suppression and Punishment) (Amendment) Act
- Commission of Enquiry (Amendment) Act
- Proceeds of Crime Act
- Committal Proceedings Act
- Securities (Amendment) Act
- The Charities Act

INPUTS FROM SELECTED GOVERNMENT AND NON-GOVERNMENTAL ORGANIZATIONS

This section reviews the activities of the Independent Commission of Investigations (INDECOM), Office of the Public Defender (OPD) and Victim Support Unit (VSU).

Some 617 complaints were received by **INDECOM**, a 3.7 per cent reduction compared with the previous year. Of the number of cases investigated based on complaints, 156 were disposed of. Authorities against whom the complaints were made included: JCF, JDF, DCS and the Transport Authority.

The **OPD** received 312 complaints from 312 complainants (58.7 per cent male). Of the complaints received, 126 were against the MNS (includes 99 against the JCF, 12 against the DCS and 6 against the JDF); 35 against the Ministry of Health; 21 against the Ministry of Finance and Planning; 14 against the MOJ; and 20 against agencies classified as "Non-Authority". Eleven complaints were from persons living outside of Jamaica. A total of 269 cases were closed. Of the cases closed, 30 were cases opened in 2013. Cases were closed because they were rejected (15), discontinued (11), not justified (2) or justified and remedied (2).

The **VSU** is the arm of the Ministry of Justice that provides assistance to persons against whom certain criminal offences have been committed. The services offered include counselling, emotional support, court support, various programmes of therapeutic intervention and other technical services. During the year the unit served 11 637 clients (4 842 new and 6 795 follow-up clients). Of these new clients, 73.5 per cent was female. Approximately 37.9 per cent of the new females who sought the assistance of the VSU were in the 12–18 age group followed by 21.3 per cent in the 30–44 age group. The main categories of offences for which clients sought the services of the VSU were: Domestic Violence, 11.5 per cent; Rape, 11.0 per cent; Carnal Abuse, 10.9 per cent; Wounding, 9.7 per cent; Behavioural Problem, 7.2 per cent; and the category "other", 25.2 per cent. There were four cases of human trafficking/suspected human trafficking. Additionally, 1 539 children (167 males and 1 372 females) benefited from the VSU's Children in Court programme which aims to reduce the level of trauma experienced by children who interface with the Justice system. Additionally, in order to increase public awareness on victim support issues and services some 518 promotional meetings were held with a total of 18 816 persons in attendance.

OUTLOOK

The achievement of goal two of Vision 2030 Jamaica will continue to guide the work undertaken by the Ministries of National Security and Justice and their departments and agencies. Implementation of the National Crime Prevention and Community Strategy and the Unite for Change programme is critical for the Ministry of National Security. The ministry will also continue to provide the policy framework necessary to manage crime and violence. The Jamaica Constabulary Force (JCF) will continue to work to reduce the level of crime in the country by focusing on persons involved in organized crime and dismantling criminal gangs. At the same time, the police will also continue to improve police–citizen relationships through community policing. The continued implementation of the recommendations of the JCF Strategic Review will ensure that the JCF has the ability to undertake its core functions.

A committee will be established to manage the welfare needs of the mentally ill inmates particularly those who are "Unfit to plea". The committee will also work with relevant agencies to have these inmates cases reviewed and necessary actions taken. Mental health/support programmes are to be developed and implemented for wards in juvenile facilities. There will also be the establishment of rehabilitation villages in partnership with stakeholders to assist in the reintegration of ex-offenders and wards. Agricultural programmes in selected Correctional Centres will be expanded to supplement the dietary needs of inmates and wards.

The priority initiative to be undertaken in the justice sector includes: strengthening the capability of justice institutions; improving the efficiency of the law in the trial of criminal matters; and upgrading and developing physical facilities. Work will also continue on a number of priority programmes and projects such as the Justice Undertakings for Social Transformation (JUST); restorative justice; child diversion and children in court; legislative and constitutional reform; Justice Security Administration and Transparency (JSAT); jury reform; and criminal case management.■

CHAPTER 25

SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE

INTRODUCTION

In the context of continued fiscal restraint, government supported by its partners focused on maintaining social gains for the broad majority, while ensuring that provisions were in place to meet the needs of vulnerable population groups. The Vision 2030 Jamaica – National Development Plan remained the guiding social policy framework, and provided the platform for much of the efforts of ministries, departments and agencies (MDAs), supported by the private sector, other non-government bodies, and international partners. Despite the challenges faced by the country, there were several notable advances and achievements at the legislation, policy and programme levels, and in the mobilization of resources. With the support of international agencies, efforts were strengthened to address shortfalls in, and accelerate the achievement of, certain Millennium Development Goals (MDGs). These included the areas of maternal and child mortality. During the year, a report on the status of achievements under the MDGs was completed.

Work continued on reviewing or finalizing various pieces of legislation, to ensure protection of the interests and rights of various population groups. Jamaica advanced the articulation of the first Social Protection Strategy, finalizing the draft by year-end. This comprehensive Strategy will seek to streamline and structure the various dimensions of social protection, towards greater inclusion, participation, coverage and more effective programming of resources. Steps were also taken to establish the Poverty Reduction Coordinating Unit, to create a new poverty thrust in keeping with Vision 2030 Jamaica. The main objective will be to define and monitor a new Poverty Reduction Policy and corresponding programme.

Significant strides were made in social inclusion, to ensure that persons with disabilities or special needs were accommodated and provided with opportunities for their development. Other vulnerable groups were again the focus of policy, legislative review, and definition of new programmes and projects. In regard to children, this was evidenced by work towards improving mental health services for children and adolescents, reducing the potential for child labour, initiation of review of the Adoption Act 1958 and the Child Care and Protection Act 2004, finalization of the Disability Bill, finalization and approval of an international Migration and Development Policy, among other issues. The focus on youth continued to be education, training and labour market engagement, while active ageing was endorsed for senior citizens. Gender equality and mainstreaming of gender into government policies, plans and programmes continued to be of priority, with particular emphasis being given throughout the various programmes and initiatives, to the issue of gender-based violence.

Community development has remained an important vehicle for transformation, empowerment and poverty reduction. Efforts remained focused on building or improving community infrastructure and facilities, expanding access to water, housing and sanitation, and improving job skills and aptitudes. The embracing of cultural identity and art forms, as well as expanding the reach of culture through various communication and information technologies, continued to be the focus of entities involved in cultural development.

FINANCING[1]

The Recurrent and Capital budgets of the Government of Jamaica (GOJ) accounted for total allocation of $24.9 billion to select social development, social protection and cultural programmes in the financial year (FY) 2013/14. This allocation represents a $0.8 billion increase compared with the previous FY[2] (Table 25.1).

Approximately $1.8 billion was allocated to the Child Development Agency (CDA). Of this amount, $814.4 million was apportioned to Children's Homes, of which 82.7 per cent was to private children's homes; $343.7 million to Places of Safety (including grants amounting to 14.1 per cent to private Places of Safety); and $83.0 million to the Foster Care programme. The remainder ($531.0 million) was allocated to the CDA for Direction and Administration. A total of $61.8 million was allocated to the Ministry of Youth and Culture (MYC) for the Office of the Children's Registry (OCR). The OCR's budget included $6.7 million for the operation of the Ananda Alert programme that was transferred from the Ministry of Local Government and Community Development (MLGCD) in January. The Office of the Children's Advocate (OCA) received an allocation of $99.3 million, which represents an 18.1 per cent increase over its FY 2012/13 allocation.

Through the Ministry of Education (MOE), a total of $3.9 billion was allocated to Student Nutrition in the Recurrent Budget compared with $3.6 billion in FY 2012/13. The Early Childhood Commission was allocated $32.0 million under the Capital B Budget for the World Bank supported Early Childhood Development Project. The Ministry of Health (MOH) also received an allocation of $19.3 million for Early Childhood Development under the Recurrent Budget. The

1 Source: Estimates of Expenditure for Financial Year Ending March 31, 2014 (as Presented to the House of Representatives)
2 Revised Estimates

TABLE 25.1
SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE
RECURRENT AND CAPITAL BUDGET BY PROGRAMME, 2012/13 – 2013/14
($'000)

PROGRAMME	REVISED ESTIMATE 2012/2013	ESTIMATE 2013/2014
RECURRENT		
Ministry of Youth and Culture		
Art and Culture (promotion of)	725 525.0	774 595.0
Youth Development Programme [a]	89 674.0	109 573.0
Child Development Agency [b]	1 672 104.0	1 774 741.0
Office of the Children's Registry [c]	-	61 832.0
Office of the Prime Minister		
Social Welfare Services (Women's Welfare)	184 378.0	191 484.0
Ministry of Labour and Social Security		
Social Security and Welfare Services [d]	1 537 121.0	1 570 912.0
Office of the Children's Advocate	84 078.0	99 309.0
Ministry of Education		
Student Nutrition	3 585 505.0	3 944 709.0
Social and Economic Support Programme	18 000.0	8 000.0
Ministry of Local Government and Community Development		
Social Welfare Services [e]	40 754.0	40 932.0
Social Development Commission	634 625.0	653 295.0
Social Security and Welfare Services[f]	463 857.0	498 487.0
Local Government Administration	2 992 730.0	2 402 071.0
Community Development	5 015 509.0	4 924 474.0
Ministry of Finance and Planning		
Private Sector Social Welfare	10 000.0	10 000.0
Ministry of Agriculture and Fisheries		
Youth Development (grant to Ja. 4-H Clubs)	194 524.0	182 017.0
Ministry of Health		
Early Childhood Development	15 000.0	19 285.0
SUBTOTAL RECURRENT	17 263 384	17 265 716
CAPITAL A		
Ministry of Youth and Culture		
Possibility Programme	10 000.0	14 679.0
Jamaica Cultural Development Commission (Jamaica 50 Celebrations)	340 000.0	10 000.0
Family Services [g]	6 065.0	60 321.0
Office of the Prime Minister		
Social Security and Welfare (Women's Welfare)	6 000.0	-
Ministry of Agriculture and Fisheries		
Youth Development (grant to Ja. 4-H Clubs)	10 000.0	-
Ministry of Local Government and Community Development		
Community Development	305 000.0	313 915.0
Social Security and Welfare Services [h]	-	12 000.0
Local Government Administration	50 000.0	62 000.0
SUBTOTAL CAPITAL A	727 065	472 915
CAPITAL B		
Ministry of Labour and Social Security		
Social Security and Welfare Services [i]	3 727 748	4 860 885.0
Ministry of Youth and Culture		
Youth Development	255 961.0	248 864.0
Ministry of Education		
Early Childhood Development (Early Childhood Commission) [j]	35 000.0	32 000.0
Student Nutrition [k]	33 806.0	18 100.0
Office of the Prime Minister		
Jamaica Social Investment Fund (JSIF)	2 043 210.0	1 852 855.0
Ministry of Local Government and Community Development		
Local Government Administration	12 858.0	21 506.0
Community Development	28 928.0	159 000.0
SUBTOTAL CAPITAL B	6 137 511	7 193 210
GRAND TOTAL	**24 127 960**	**24 931 841**

a - Grant to private social services organizations for youth development
b - Includes allocation for the Office of the Children's Registry
c - The OCR's allocation was previously included in that of the CDA
d - Social Security and Welfare Services deal with the administration of the National Insurance Scheme; Public Assistance, and Food Security programmes for persons with disabilities and the elderly
e - Social Welfare Services include provisions such as poor relief services through the Board of Supervision to elderly poor in infirmaries, as well as the homeless
f - Refers to Social Security and Welfare provisions under Local Government Administration
g -This provision is for the repair and refurbishing of selected Children's Homes and Places of Safety
h - This is a grant to Parish Councils for Poor Relief Services
i - Provision to Social Protection programmes including PATH and Steps-to-Work (IBRD and IDB supported projects)
j - Early Childhood Development Project (IBRD)
k - School Feeding Modernizing Programme (IDB)

Source: Estimates of Expenditure for Financial Year Ending March 31, 2014 (as Passed Presented to the House of Representatives)

MYC received $109.6 million for youth development services in the Recurrent Budget, and an additional $248.7 million in the Capital B Budget for the Inter-American Development Bank (IDB) supported Youth Development Programme. A $14.7 million grant was included in the MYC's budget for the Possibility Programme reaching street boys. A grant of $10.0 million was allocated to the Jamaica 4-H Clubs for youth development initiatives under the Ministry of Agriculture and Fisheries (MOAF). The clubs also received an additional $182.0 million in the Recurrent Budget.

A provision of $774.6 million went to the MYC for the promotion of Arts and Culture, an increase of $49.1 million compared with the FY 2012/13 allocation. Of this amount, $325.8 million (41.1 per cent) was allocated to the African/Caribbean Institute of Jamaica/Jamaica Memory Bank; $274.9 million (35.5 per cent) was apportioned to the Jamaica Cultural Development Commission (JCDC); and $170.9 million went to the Jamaica National Heritage Trust. Of the amount allocated to the JCDC, approximately $91.6 million was for the development and promotion of cultural programmes.

Approximately $191.5 million was allocated to the Office of the Prime Minister (OPM) for women's welfare through the services provided by the Bureau of Women's Affairs (BWA){$54.5 million} and its Non-governmental Organization (NGO) partners ($2.5 million); as well as the Women's Centre of Jamaica Foundation ($134.5 million).

An allocation of approximately $1.6 billion was made to the Ministry of Labour and Social Security (MLSS) for Social Security and Welfare Services under the Recurrent Budget, representing an increase of $0.5 billion compared with the previous FY. This allocation includes $459.5 million to the National Insurance Scheme (NIS) for its modernization and administration; operation of the Early Stimulation Programme for children 0 to 6 years with disabilities ($42.0 million), representing a 63.4 per cent increase relative to its allocation for the previous year; and direction and administration of public assistance services ($230.4 million). The $1.6 billion allocation to the ministry also includes grants to:

- Parish Council for Poor Relief Services ($269.2 million)
- National Council for Senior Citizens ($73.7 million)
- Jamaica Council for Persons with Disabilities ($74.3 million)
- Rehabilitation Grant Programme ($127.9 million)
- Abilities Foundation ($8.8 million)
- Assistance to Ex-Servicemen ($7.9 million)
- Private Sector Social Welfare Agencies ($20.6 million), including the Jamaica Red Cross
- Society and the Jamaica Society for the Blind
- Golden Age Homes ($259.7 million).

Under the Capital B Budget, a combined allocation of $4.9 billion was made to the MLSS for Social Protection Services including the Programme of Advancement Through Health and Education (PATH) and the Steps-to-Work Programme. The allocations were made through the following projects:

- Social Protection Project (World Bank), $382.6 million
- Social Protection Support to Food Price Crisis Project (IDB), $6.0 million
- Support to Improve the Lives of Persons with Disabilities Project (IDB), $34.0 million
- World Bank–Japanese Social Development Fund (JSDF) Support to PATH, $39.5 million
- Social and Economic Inclusion of Persons with Disabilities Project (World Bank), $35.0 million
- Integrated Social Protection and Labour Programme (IDB), $4.4 billion.

The Ministry of Finance and Planning (MOFP) also received $10.0 million for grants to voluntary social services NGOs (United Way of Jamaica and the Council for Voluntary Social Services).

The MLGCD received an allocation of $40.9 million from the Recurrent Budget for Poor Relief Services, including allocation to the Board of Supervision (20.0 per cent) for the operation of infirmaries and to the Homeless (Street People) Programme (21.0 per cent). An additional $62.0 million was apportioned for Local Government Administration under the Capital A Budget and $21.5 million under Capital B. Allocations for community development services included: $4.9 billion under the Recurrent Budget, $313.9 million under Capital A and $159.0 million under the Capital B Budget. The Social Development Commission was allocated a total of $653.3 million for community development services. The Jamaica Social Investment Fund (JSIF), an agency of the Office of the Prime Minister, also received $1.9 billion (Capital B) to support community-based poverty alleviation interventions.

SOCIAL DEVELOPMENT

Within the context of the Vision 2030 Jamaica – National Development Plan; and the recognition of the various global commitments made to social policy issues, government stakeholders and partners focused on enhancing the enabling environment, and the delivery of social services to the population. The broad policy context included the recognition and protection of the rights of children, adolescents, persons with disabilities and the elderly; the effective delivery of social services; integration and mainstreaming of gendered considerations; development and enhancement of the policy and legislative environment; and the pursuit of evidence-based interventions through a dynamic research agenda.

A draft report on the status of the country's achievement of the MDGs was completed during the year. The findings indicated that targets in universal primary education, access to reproductive health services, and the spread of HIV/AIDS were either achieved or on track, while poverty rates, maternal and child mortality, and gender equality targets were lagging or well behind. The findings reflected successful efforts by government and its partners in addressing issues such as reduction in adolescent fertility, constraining the spread of HIV, changing sexual behaviour and improving reproductive health within the population. The comprehensive report underwent an extensive review process, with multiple stakeholder participation and input.

Children (0 to under 18 years)

Approximately 29.8 per cent (809 600) of the total population is categorized as children, with boys accounting for

50.8 per cent (STATIN). The government continued to focus on the protection of the rights of children to survival, development, and participation. Implementation of the policy and programme agenda for children saw the involvement of a range of government agencies, non-government organizations, civil society organizations, the private sector, and international development partners (IDPs).

Policy, Legislation and Research

The Child Development Agency (CDA), an agency of the Ministry of Youth and Culture, in collaboration with various partners, led the major **policy and legislative review** processes during the year. Consultations were held and policy papers drafted to amend the Child Care and Protection Act 2004 (CCPA) and the Children (Adoption of) Act 1958. With regards to the CCPA, a series of focus group and regional consultation sessions and interviews were held, involving 420 adults and children. Consultations on the review of the Children (Adoption of) Act involved over 350 stakeholders. Through a decision of Cabinet in August, efforts were also made to decriminalize children who were deemed "uncontrollable" according to the justice system. The decision required that amendments be made to Sections 8 and 24 of the CCPA, and its implementation is pending consultations with key stakeholders.

The draft National Plan of Action for an Integrated Response to Children and Violence, completed and submitted to the CDA in 2012, received feedback from the Ministry of Finance and Planning and other stakeholders. A National Child Diversion Policy was also drafted by the Ministry of Justice and shared with key stakeholders for feedback. The Child Diversion Policy will see fewer children who find themselves in conflict with the law being incarcerated (see chapter on National Security and Justice).

A national plan for the Elimination of Mother-to-child Transmission of HIV and Syphilis was approved and its implementation commenced. The national plan is based on the results of a rapid assessment of the prevention of mother to child transmissions (PMTCT), which highlighted several bottlenecks in implementation and put forward recommendations to address them. The National Infant and Young Child Feeding Policy was also presented to the Human Resource Committee of the Cabinet, and received approval for tabling in the Houses of Parliament. The year also saw the approval of the *National Policy for the Reintegration of School-Aged Mothers into the Formal School System* (see chapter on Population), the completion of the first draft of the National Policy on Child Labour, and the drafting of a School Feeding Policy by the Ministry of Education (see chapter on Education).

With regards to **research**, a national birth cohort study, co-funded by UNICEF, the Inter-American Development Bank (IDB) and local funding agencies, continued to progress according to schedule. Data were collected from 5 204 mothers during the antenatal phase; 9 500 mothers and 3 330 fathers during the birth phase; 7 814 mothers during the 9–12 month phase; 2 453 mothers during the 18–22 month phase; 2 035 neonatal admissions; 1 013 mothers during the 18–22 month phase; and 265 fathers during 18–22 month phase. Data entry was completed for all data collected. Preliminary analysis of the data provided estimates for neonatal and infant mortality. Further work will also measure the extent of under-registration and establish main causes of these deaths.

The Caribbean Child Development Centre (CCDC) continued to contribute to the body of knowledge on issues affecting children through research and training. The Centre partnered with the Anglia Ruskin University, United Kingdom to secure funding from the British Academy for a series of exchange activities aimed at developing a proposal for youth violence and gang research. The CCDC was also commissioned by UNESCO to construct and manage a Health and Family Life Education (HFLE) website hosted on the University of the West Indies Open Campus' server, to support HFLE school practitioners at the pre-primary, primary and secondary levels, as well as stakeholders and partners. Along with the website was complementary research to assess the needs of practitioners and challenges in the delivery of HFLE. Following the 2012 Needs Assessment of the UWI Open Campus Early Childhood Institutions (ECIs) in Jamaica, Antigua and Barbuda, and Trinidad and Tobago, the need for state-of-the-art laboratory schools hosting early childhood aged children was observed. The CCDC developed proposals to restructure the present ECIs within the Open Campus into streamlined model centres to host students and researchers in keeping with international best practice. The Child Rights Training Sustainability Initiatives project continued in 2013, focusing on the Jamaica Constabulary Force. The CCDC partnered with the Academic Programming and Delivery (APAD) Division of Open Campus to develop the Continuing Professional Education programme in Early Childhood Development.

Baseline data of the knowledge, attitudes and practices of Jamaicans regarding child abuse and the reporting of such incidents was collected, analysed and the final report presented to the Office of the Children's Advocate (OCA). The findings were also shared with stakeholders via the media in December. The findings reflect the views of more than 1 500 members of the public including students, school-based professionals, health and social workers. The research recommendations are expected to inform the efforts of the OCR to develop and effectively implement a communication strategy to increase reporting of child abuse by children and adults, especially child sexual abuse.

During the second quarter of the year, the Child Protection Database (CPD) Group comprising 12 ministries, departments and agencies (MDAs) successfully uploaded new data to the JamStats database. To ensure optimal functioning, an information technology audit was conducted to determine the data management capabilities of each member to inform the development of an implementation plan for improved efficiency. The findings revealed challenges such as insufficient skilled technical staff, ageing computer software and lack of clarity regarding the role of CPD partners who provide technical support to the group. The findings of the study highlighted the need for more efficient computerized databases within child protection agencies.

A Tracer Study of graduates of the 2011 School Suspension Intervention Programme (SSIP) of the Dispute Resolution Foundation was conducted to ascertain the long-term (one year) impact of the programme on its beneficiaries. The findings indicated that the behaviours learned and applied during the SSIP were sustained by most graduates of the programme. During 2013, the SSIP provided rehabilitation sessions for 466 children, mainly boys (297), from primary and secondary schools who were suspended for violent behaviour. The programme contributed to improvement in children's skills in the areas of anger management and conflict resolution, and self-analysis. The capabilities of 62 parents and 27 school-based professionals were strengthened in the areas of alternative methods of discipline, anger management, and conflict resolution.

The CDA, in collaboration with other government and civil society partners, commissioned a study to assess and identify

the intervening variables that contribute to bullying. This research seeks to provide guidance to practitioners by developing profiles of both the bully and victim, developing an integrated response mechanism designed to bring awareness to the issue at a national level, and contributing to the elimination or reduction in incidents within all spaces. This is the first study of its kind in Jamaica and was initiated after the CDA conducted an internal study among children in the child protection system and found that over 70.0 per cent of respondents were impacted negatively by the act of bullying or had participated in bullying. The research methodology was sent to the Advisory Panel on Ethics and Medico-Legal Affairs of the Ministry of Health (MOH) for independent review and sign off prior to the commencement of the fieldwork.

The 8th annual Caribbean Child Research Conference (CCRC) was held in November under the theme "Beyond 2015: Safeguarding our Children's Future". The event is convened annually by the Sir Arthur Lewis Institute of Social and Economic Studies (SALISES) in partnership with a range of stakeholders including government, NGOs and IDPs. There were over 300 participants on both days of the conference, with representatives from government, NGOs, schools, and international organizations. As in previous years, awards were given to the most Outstanding Child Researcher and the winner of the primary school essay competition. The sessions included presentations on research in the areas of child rights, substance abuse, disability, children in state care, and children in violent circumstances.

Participation of children in matters related to them at all levels of Jamaica's governance structure remained an important element of the CDA's focus. In support of this policy position the Agency launched and supported its Children's Advisory Panel (CAP) in the following activities:

The Panel met quarterly to conduct its business based on the agenda determined by its members.

- A case study was conducted regarding the living conditions of children within state care at residential childcare facilities, complete with recommendations to the Agency's executive management based on the rights and needs of those wards.
- The Trafficking in Persons Act 2009 was reviewed and recommendations submitted to the CDA.
- Members of the CAP facilitated the focus group reviews of the Child Care and Protection Act 2004 (CCPA) as well as the Adoption (Children of) Act 1958 among children, including a representation of those in state care; and participated in the wider national stakeholder consultations of the CCPA.
- The plenary sessions aimed at consolidating thoughts shared and recommendations made at the Caribbean Child Research Conference were chaired by members of the CAP for the second consecutive year.
- The CAP participated in the review of a child-friendly version of the United Nations Convention on the Rights of the Child (CRC) Optional Protocol on the Sale of Children, Child Prostitution and Child Pornography.
- The Chairman of the CAP was selected as the Caribbean's representative to the Youth Advocacy Group for *Education First*, which is the UN Secretary-General's Global Initiative on Education.

The OCR also appointed nine child ambassadors (six females) in 2013. Three child ambassadors in three schools (CA) participated in the operation of OCR Clubs in Schools (CIS). The CIS are intended to offer opportunities for children to liaise and work with the OCR. The CIS is implemented through partnerships between the OCR and the principals of each participating school. The CA engaged children at presentations, outreach activities, sensitization sessions targeting children, community-based programmes and projects, among other public education activities. The CA educated children and adults about child rights and child abuse and shared tips with them on how to protect themselves from abuse. Through various media, they also underscored the importance of breaking the silence and reporting child abuse to the OCR. The OCR's CA wrote a news feature that was included in the spring issue of the *Nex Generation* magazine, participated in activities to commemorate Child Month and World Day Against Child Labour, as well as consultations on the review of the Child Care and Protection Act 2004, led by the CDA. Children of varying ages were also instrumental in the creation of two jingles that were integrated into the OCR's public education campaign and played in the media, at school tours, and other public education events.

Programme Delivery

Under the GOJ/UNICEF Country Programme 2012–2016 several areas of achievement affecting the lives of children and families can be noted. With the support of the Social Development Commission, UNICEF continued to implement the CHOICE programme to assist communities to achieve goals and priorities, and to channel resources to create sustainable solutions to their issues. The programme continued its intervention in five communities in two western parishes as part of a pilot. The communities were selected based on a combination of indicators including school drop-out rates, reported cases of child abuse and level of interest in the programme. In 2013, UNICEF and SDC established baselines via community profiles, in order to build the community-level programming. A gender and child-focus format was used to derive the indicators.

Child Month was observed in May under the theme: "Children's Care and Protection: A Fi Wi Mission" and activities to observe the month were led by the National Child Month Committee (NCMC). With the main focus being on showing children that they are loved and cared for, the committee developed a calendar with 31 ways in which citizens can show the nation's children that "we care". These included asking them about themselves; discussing their dreams; telling them a story; playing outside with them; praying with them; tolerating their interruptions; and empowering them to help themselves.

The GOJ, with funding from the European Union and UNICEF began the implementation of the Reducing the Juvenile Population in State-supported Institutions (RJSPI) Project. The project aims to improve protection of the rights of children, non-custodial approaches to rehabilitation with an emphasis on good mental health, empowerment and reintegration. The two sub-components of the project are (i) a mobile mental health service (MMHS) — the Smiles Mobile — for children in state-supported institutions and (ii) a National Child Diversion Programme (NCPD). The main implementing agencies are the Ministry of Youth and Culture/Child Development Agency, the Ministry of Health/Child and

Adolescent Mental Health, the Ministry of National Security/Department of Correctional Services, and the Ministry of Justice. With regards to the MMHS component of the project, a thirty-seater bus was acquired and retrofitted in time for the project launch in November. The unit will be staffed by a team of five persons, comprising two social workers, one psychologist, one psychiatrist and a driver. The MMHS will be piloted in the South East Region.

Some 40 decision makers across four hospitals received training in the WHO/UNICEF course on *Strengthening and Sustaining the Baby Friendly Hospital Initiative.* Just over 1 000 health-care workers were equipped to promote breastfeeding among pregnant women and facilitate skill building among new mothers. Additionally, 32 500 booklets to reinforce the benefits of breastfeeding and assist health staff in giving information to pregnant and new mothers were reproduced and disseminated in primary and secondary care institutions. Efforts were made to convert the 20-hour Breastfeeding Promotion and Support in a Baby-friendly Hospital course into an online course for medical doctors and clinical staff. With the development of this course, more doctors and clinical health workers will be expected to acquire the skills necessary to promote and support exclusive breastfeeding among new mothers.

One of the six domains cited for Child Friendly Schools (CFS) is inclusiveness. The MOE, with support from key non-governmental organizations for persons with disabilities, reviewed existing curricular materials used for teaching children with disabilities and identified components which would comprise a curriculum for such children. The expected outcome of this intervention will inform the development of the new curriculum for children with moderate to severe hearing disabilities. Work commenced with the Jamaica Association for the Deaf to improve literacy, including formalizing the Jamaican Sign Language.

The MOE established a committee to develop a school-wide positive behaviour intervention and support (SWPBIS) framework, which will have strong links to guidance interventions such as the Programme for Alternative Student Support (PASS). A Guidelines and Procedures Manual for the PASS was partially revised for piloting. An expansion of PASS was advanced to ensure greater student access to psychosocial services, especially for students at-risk. Expansion will also include a sexual and reproductive health referral mechanism and other components. As a result of work completed, work commenced on the drafting of a manual for the delivery of psychosocial support services to students and their families. The ministry also drafted a Guidance and Counselling Policy that will address among other programmatic interventions the implementation of the SWPBIS and PASS and bring coherency to the implementation of both.

In July representatives of the CDA, OCR, and UNICEF participated in a regional training on the assessment and mapping of child protection systems and the development, monitoring and evaluation of child sexual abuse programmes. These workshops not only provided learning opportunities but also facilitated the drafting of action plans (at the country and sub-regional levels) that highlighted the importance of joint/inter-agency/inter-sectoral programming, which will facilitate the establishment of new memoranda of understanding (MOU) between child protection MDAs. The CDA expanded the work of three Child Protection Committees in St. Catherine, Clarendon and St. James. Child Protection Committees foster, monitor and coordinate inter-agency and inter-sectoral collaboration among public sector, private sector, civil society and community-based organizations to ensure the safety and well-being of the children of the parish.

Initiatives to bring the practices of child protection professionals into conformity with the United Nations Convention on the Rights of the Child (UNCRC) and promote quality rehabilitation and reintegration included:

- The Office of the Children's Advocate established Child Justice Guidelines for judges, magistrates, social workers, medical practitioners, police officers, prosecutors and victim support workers to guide their interaction with children who come into contact and conflict with the law.
- The Code of Ethics for Professional Social Workers and Social Service Workers was launched and disseminated.
- Raising awareness for approximately 530 prescribed persons (professionals obligated under the Child Care and Protection Act to report incidents of child abuse) was achieved during six workshops held in three parishes that emphasized their responsibilities and the sanctions that would be applied if they failed to comply.
- The Caribbean Child Development Centre, University of the West Indies equipped 253 police officers and school-based deans of discipline with knowledge and tools to protect and promote the rights of children who come into contact and conflict with the law. A module was also developed to mainstream the training into the revision of the Jamaica Constabulary Force Police Academy's curriculum and its in-service training programme.
- Birth registration and/or certification increased by 2 352 for children 0–12 years old who received free birth certificates through fairs, and other interventions, organized by the Registrar General's Department.

Parenting

As part of the government's thrust towards improved parenting knowledge and practice nationally, a National Parenting Support Commission (NPSC) was established in July. Governed by the National Parenting Support Commission Act 2012 and the National Parenting Policy (2011), the NPSC was established to provide improved coordination in the area of support to parents. The NPSC will facilitate the implementation of all aspects of the National Parenting Policy, including: raising awareness of parenting issues and access to parental support nationally; streamlining and coordinating the delivery of existing parenting programmes; and initiating programming responsive to emerging needs.

During the year a functional profile was developed for the entity, a Board was established, and an Executive Director engaged. The NPSC worked closely with MDAs and IDPs, through technical committees and working groups, in designing pilot projects with parenting focus. This included a National Parents' School Pilot Project. The NPSC also commenced the selection of courses to be included in the National Parenting Curriculum and established Parents Places in collaboration with the MOE. An information fair was held in Kingston, Portland and St. Ann, respectively, under the theme "Transitioning into Secondary School". The fairs were

supported in part by the private sector, with a donation totalling approximately $3.9 million. Three parenting sessions were also held on:

- Managing a Successful Transition: Teaching your Child(ren) to Cope while Sustaining the Relationship
- Starting High School: Helping Your Teenager Adjust
- Fathers Matter: Engaging Your Child(ren).

The events attracted some 2 200 participants plus listeners from the live broadcast of sessions and interviews with presenters and 43 exhibitors from both the private and public sectors. Over 30 adults and children in Portland also received medical check-up.

National Parent's Month was observed in November. Activities included: the hosting of two parent villages in Kingston and St. Ann; NPSC's participation in nine parenting seminars on various issues; and several media interviews.

Early Childhood Development (ECD)

The ECD sector manages interventions for children ages 0–8 years old. Interventions for this cohort typically include health, education and early stimulation. The Early Childhood Commission (ECC), an agency of the Ministry of Education has monitoring and regulatory responsibility for ECD. The ECC recorded the operation of 2 525 Early Childhood Institutions (ECIs). Of this number, 94.8 per cent applied for registration and 55.6 per cent received a permit to operate. The ECC with the support of its government, non-government and international development partners, finalized activities under the 2008–2013 National Strategic Plan (NSP) supported by the GOJ/World Bank Early Childhood Development Project. The project was geared towards improving the monitoring of children's development; the screening of household-level risks affecting such development; early intervention systems [to promote such development]; as well as strengthening and enhancing the quality of ECIs. The development and utilization of a Child Health and Development Passport (CHDP) in all health centres was one of the major achievements over the life of the project. During the year, the ECC undertook several training sessions for practitioners and staff, including islandwide training of 2 309 practitioners in the use of the CHDP. This was done in partnership with the MOH. Discussions commenced between the GOJ and the World Bank regarding the development of a new ECD project. The ECC also consulted with its partners to develop a new NSP for 2014–2019 (see chapters on Education and Health for additional information on Early Childhood Development).

Children at Risk

The Office of the Children's Registry (OCR) is responsible for receiving reports of child abuse and recording, assessing and referring them to the CDA, Office of the Children's Advocate (OCA) and the Centre for the Investigation of Sexual Offence and Child Abuse (CISOCA) for investigation and action. As at December, the OCR had received over 41 000 reports since its inception in 2007. Reports in 2013 were in excess of 8 000[3]. In fulfilment of the statutory requirements of the CCPA to effectively manage all reports of child abuse, the OCR expanded its reach in May by commencing operations from the CDA's offices in Manchester and St. Ann. This sharing of resources with the CDA allowed the OCR to contain spending, thereby allowing the organization to focus its resources on the development and expansion of its programmes.

As at March, the OCR assumed responsibility for the Ananda Alert System, which was transferred from the Ministry of Local Government and Community Development (MLGCD) to the Ministry of Youth and Culture (MYC). With the transfer of the Ananda Alert System, the OCR reviewed its mission and vision statements to reflect the expansion in its mandate. The Ananda Alert System is a nationwide system that was designed in May 2009 to ensure the speedy and safe recovery of a child in the event that he or she is abducted or kidnapped. The system involves the mobilization of stakeholders to get the message of a missing child into the public domain as soon as a report is made to the police. Efforts to improve the system included the signing of an MOU with participating agencies. A process flow and records management mechanism was developed and implemented for the receipt and referral of reports on missing children. As at December, there were 2 205 reported cases[4] of missing children, with the majority (78.1 per cent) being females. Of the total number of reported cases, 1 725 (1 350 females) were returned, 14 were deceased (10 males), and 467 remained missing (369 females).

In December, the OCR participated in a study tour to Canada. The objectives were to ascertain and examine the information systems, procedures and protocols in dealing with abducted and missing children through the Amber Alert system, to review the mechanisms used by the State of Toronto to search and rescue missing children, and discuss the protocol governing the psychological support given to these children. The OCR was also represented at a UNICEF supported meeting in Antigua and Barbuda on addressing sexual abuse against children.

The OCR continued its focus on building public awareness on child abuse, the role of the Registry, and the Ananda Alert system. These initiatives included 171 presentations to various stakeholder groups including schools, churches, medical practitioners, and police officers. The OCR facilitated 67 media interviews, produced periodical press releases, made several public service announcements and time signals aired through radio and television, and placed numerous print advertisements in national newspapers and various magazines. In September, the OCR also hosted a press conference at the Office of the Prime Minister's Press Room.

The Centre for the Investigation of Sexual Offences and Child Abuse (CISOCA), a unit of the Jamaica Constabulary Force, received 1 362 reports. The majority of the reports received pertained to sexual intercourse with a person under 16 years (625) followed by rape (316). Other reported offences included Sexual Touching (85), Cruelty to Child (79), Buggery (30), Incest (9) and Abduction (4). With regards to reported offences against children in particular, 903 were against children 11–15 years, 359 against children 16–17 years, 110 against children 5–10 years, and 21 against children 0–4 years. The Centre continued to partner

3 Figures reflect original reports made about a particular child and do not include subsequent reports made to the OCR regarding the same incident or any other incident of abuse pertaining to the same child.

4 The total number of cases is not necessarily equated to the total number of children, as a single child could be reported missing more than once.

TABLE 25.2
INTAKE SERVICES REPORTS RECEIVED AND PROCESSED BY INCIDENT TYPE

Intake Incident Classification	2012 Male	2012 Female	2012 Total	2013 Male	2013 Female	2013 Total	% Change
Sexual Abuse	47	499.0	546.0	102.0	362.0	464.0	15.0
Physical Abuse	275	284.0	559.0	222.0	223.0	445.0	20.4
Child Exhibiting Behavioural Problems	1 349	1 389	2 738	1 508	1 376	2 884	5.3
Abandonment	16.0	10.0	26.0	23.0	14.0	39.0	50.0
Other	795.0	907.0	1 702	1 702	1 173	1 677	1.5
TOTAL	**2 482**	**3 089**	**5 571**	**5 571**	**3 148**	**5 689**	**100.0**

Note: "Other" comprises cases of neglect, request for financial support or support for accessing other social services, etc

Source: Child Development Agency

with the CDA, OCR, OCA and other agencies to investigate reports, make referrals for child victims, and make arrests. The CISOCA continued its ongoing sensitization sessions, while members of staff benefited from various training opportunities.

Some 1 337 children were served by the CDA and its partners under the Multi-Agency Strategic Development for Child Protection Project, housed at CISOCA. Of this number, 1 295 or 97.0 per cent was diverted from the courts. It is estimated that it would have cost the government approximately 7.7 million per week to have brought these children before the court for care and protection matters and to find alternate living arrangements for them. The project is actively supported by organizations such as the CDA, OCR, OCA, Women's Centre of Jamaica Foundation, Victim Support Unit and CISOCA. As part of the overall response mechanism, the programme seeks to reduce incidents of re-traumatizing victims and diverting children from the justice system.

The CDA received and processed 5 687 cases (3 148 females) at its Intake Desks islandwide. Cases were treated in office; referred to the courts, allied agencies, or partners for psychosocial interventions; or investigated further. Table 25.2 provides the details of the types of reports processed disaggregated by sex of child impacted. As in the previous year, the majority of reports related to Behavioural Problems (50.7 per cent), followed by the category Other, with 29.5 per cent. More boys than girls were exhibiting behavioural problems, or were abandoned. However, more girls were either sexually or physically abused (see Table 25.2). The CDA also recorded critical incidents impacting children within its system. There were 324 such incidents, 174 involving females. The South East region recorded the highest number (156) of critical incidents.

As at December, a total of 4 621 children (50.4 per cent female) were in the care of the state, representing a decrease of 604 children compared with the previous year (Table 25.3a). Similar to 2012, the majority of children in care was in Children's Homes (1 341 or 29.0 per cent). Of these, 811 were males, and 53.3 per cent was in the South East region. The second largest category of children was those who were home on Supervision Order (985), followed by those in Foster Care (894), then by those who were reintegrated with their families (Family Integration). This is in keeping with the government's focus towards keeping children in family environments as against state institutions. There were 332 children in Places of Safety, 199 being females. Some 50.0 per cent of these children were in the South East Region. Of the total number of children in care, 345 were residing in government facilities (Table 25.3b). The Children and Family Support Unit (CFSU) of the CDA provided psychosocial support to some 2 900 children and families in the South East and Western regions in an effort to divert children from the child protection system. Of this number, only 12 were brought before the courts.

During the year, the OCR referred a total of 5 326 reports of child abuse to the CDA for investigation in accordance with the mandate of the Child Care and Protection Act, 2004. Of the total number of reports referred to the Agency, 55.0 per cent was completely investigated and reports sent back to the Registry. Other cases for investigation were in progress and at

TABLE 25.3A
POPULATION OF CHILDREN IN CARE BY REGION AND PLACEMENT CATEGORY FOR QUARTER ENDING DECEMBER 31, 2013

REGION	Foster Care			Family Reintegration			Children's Home			Places 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	110	167	277	167	192	353	432	299	731	65	81	146	266	300	566	46	35	81	1 086	1 074	2 160
North East	83	77	160	47	24	71	65	38	103	37	39	76	39	60	99	5	2	7	276	240	516
Western	136	148	284	97	86	183	158	93	251	15	37	52	66	119	185	60	41	101	532	524	1 056
Southern	80	93	173	71	89	160	156	100	256	16	42	58	44	91	135	33	74	107	400	489	889
TOTAL	**409**	**485**	**894**	**382**	**391**	**773**	**811**	**530**	**1 341**	**133**	**199**	**332**	**415**	**570**	**985**	**144**	**152**	**296**	**2 294**	**2 327**	**4 621**

Source: Child Development Agency

TABLE 25.3B
POPULATION OF CHILDREN IN GOVERNMENT INSTITUTIONS FOR QUARTER ENDING DECEMBER 31, 2013

INSTITUTION	Total
The Father's House	7
Summerfield Boys' Home	22
Muirton Boys' Home	21
Manning Boys' Home	53
Granville Place of Safety	52
Homestead Place of Safety	72
Glenhope Child Care Facility	39
Blossom Gardens Child Care Facility	51
St. Augustine Child Care Facility	28
TOTAL	**345**

Source: Child Development Agency

different stages of completion at the end of September. Of the 5 326 reports referred to the CDA, some 1 939 were assigned to the Investigation Unit. Between April and September, the unit completely investigated 754 cases (39.0 per cent). The unit operates in three parishes and cases were assigned accordingly: Kingston and St. Andrew received 1 030 cases and completed 423 (41.0 per cent); St. Catherine received 543 cases and completed 196 (36.0 per cent); while Clarendon received 366 cases and completed 143 (39.0 per cent).

The CDA's investigative unit experienced challenges handling the volume of cases being referred for investigation. While approval was given by the MYC to engage additional Children's Officers in the last financial year, no budgetary provisions were made. However, budgetary support was thereafter made available for the recruitment of an additional three Children's Officers. The Agency also took action in responding to the shortage of human resources by brokering a partnership with the University of Technology for its third and fourth-year students from its child development course to do an internship with the CDA. This initiative was led by the Ministry of Youth and Culture, with the signing of an MOU in April. The partnership was reviewed in August, and revealed that eight students were placed with the Investigation Unit in FY 2012/13, resulting in the clearing of over 800 cases. For FY 2013/14, the university placed eight fourth-year and four third-year students with the Agency's Investigation Unit for eight and four week intervals, respectively.

Over the year, the CDA made 1 924 visits to police stations and jails islandwide, in an effort to monitor the detention of persons under 18 years of age. The Agency also continued to monitor residential child care facilities (RCCF). The CDA's Facility Monitoring Team comprising five individuals made 738 visits (386 announced, and 352 unannounced) exceeding the total number of anticipated visits (616). Some visits were conducted during the nights and on weekends. The annual inspection audit of RCCF and a Rapid Assessment of the Maxfield Park Children's Home were completed. Renovation and rehabilitation activities to THE GOJ managed RCCF, valued at $22.2 million, also commenced. The CDA also sought to address several challenges facing the child protection system through: expanded public outreach and education, sensitization and awareness; forging increased partnerships with the NGO community; networking with other government agencies; and developing strategic child protection initiatives and materials.

Building capacity of staff remained a high priority for the CDA. As at the end of September, 44 Children's Officers completed 48 hours of training in Play Therapy; 32 Children's Officers and Facility Managers and other senior staff were trained in Behaviour Modification; 10 Children's Officers were trained in Psychiatry; 25 staff in Sign Language; 50 staff and 27 wards in Resistance Education Against Drugs; and 25 Instructors/Teachers trained to "Teach Students with Disabilities and Special Needs in a Mixed Abilities Classroom". The Legal Officer also led training sessions to empower 62 Children's Officers and regional staff on key aspects of the Child Care and Protection Act 2004. Other members of staff participated in workshops in leadership, accounts and grief counselling. The CDA also sought to identify and build capacity at the national and local levels through the operations of its Child Protection Committees (CPCs). A Dipstick Survey was done and the results used to guide the areas of focus for the CPCs. The committees are being used as an additional layer towards the elimination, if not, minimization of the impact of violence against children, to identify risk factors, and put programmes in place to address these.

The Office of the Children's Advocate (OCA) continued to protect and promote the rights of children through its legal, regulatory, investigative, educational and advisory functions. A total of 469 reports were made to the OCA during the year. Of the total, 278 were made directly to the OCA and were recorded in its Journal of Complaints, while 191 were referred by the OCR. Of the total number of cases, 367 were complaints against relevant authorities, while 102 were clients seeking legal representation. The majority (189) of complaints made against relevant authorities was against schools. Complaints were also made to the OCA regarding police stations, state care institutions, other government entities, inter alia. The single largest category of reported cases was concerning physical abuse (126), followed by sexual abuse (55), then neglect of duties (51). Based on data entered into the OCA's electronic database for the period April to December, approximately 59.8 per cent of those clients for which legal representation was sought were females.

The Child Labour Unit within the MLSS continued to lead the policy and programme interventions to address and prevent **child labour**. One major achievement of the year was the finalization of a *Child Labour Handbook for Professionals*, launched in February. This handbook seeks to address child labour issues and show how it should be addressed by various groups including law enforcement officers, members of the educational sector, social workers, and members of the legal fraternity. Further to the launch, sensitization sessions were held with members of the Jamaica Constabulary Force to introduce and disseminate the handbooks, and a reference manual was also specially developed for the legal fraternity, with whom sensitization seminars were also held. Public awareness efforts continued with: the distribution of brochures at major universities; the hosting of seminars with the Occupational Safety and Health (OSH) Department at the MLSS to review the OSH Bill as it pertains to hazardous and light work conditions; and the display of messages on LCD screens at sports events. Jamaica was recognized by the International Labour Organization (ILO) in 2013 as a best practice in targeted action to combat Child Labour through sports mentorship. The Tackling Child Labour through Education Project (TACKLE), launched in February 2009, was concluded in March. The main project achievements were: an enhanced knowledge base on child labour; direct support for over 600 children engaged in child labour; increased community awareness; and support through Sports Mentorship Clinics.

The **Possibility Programme**, for boys and young men 10–18 years on the street, continued to offer remedial education

and skills training, spiritual and social development, and provision of basic necessities including food and shelter. The programme also sought to reunite the boys with their families, where appropriate. Among the major achievements for the year was the receipt of a licence from CDA to operate as a RCCF. The Jamaica Social Investment Fund (JSIF) administered Poverty Reduction Programme (PRP) provided financial support to cover repairs to the hostel. It is anticipated that the hostel will now be able to operate at maximum capacity of 28 residents. The PRP support to the programme also included an ornamental fishing income generation component. Other achievements during the year included a partnership with the Jamaica Defence Force (JDF), with support from Supreme Ventures, to provide an on-the-job skills training course at Up Park Camp in which seven young men from the programme were enrolled. Steps were also taken to relocate the skills employment centre from Half Way Tree to where the hostel is located in order to facilitate participation of all students attending the Skills Training and Employment Centre in the income generating activities at the hostel and provide additional space for skills training opportunities. The programme also partnered with World Skills Jamaica, resulting in the selection of 10 students to receive training in the area of PC-Assembly, as part of the trainers "Values Icon Initiative". With the assistance of the National Centre for Youth Development (NCYD), the programme established a computer lab to provide technological resources to do homework. A total of 41 boys were served by the programme: 7 through the care centre, 20 through the skills centre; 7 through the JDF partnership; and 7 at the hostel.

Child and Adolescent Mental Health Services (CAMHS) continued to be provided, with an increasing recognition of the need for partnership among key government stakeholders. The Child Guidance Clinic continued to serve its clientele amidst its human resource constraints and increasing demand for the service. The number of clinic visits increased by approximately 20.0 per cent above projection (8 000 in 2012 to 9 600 in 2013). Preliminary discussions began regarding the need for an adolescent psychiatric in-patient unit located within the government services.

Youth (15–24 YEARS)

Positive youth development remained a focal point for both the government and civil society. The population in 2013 was comprised of 530 400 youth or 19.5 per cent of the total population. The average annual youth labour force totalled 202 800, with males accounting for 57.0 per cent of the youth labour force. The ILO 2014 Global Employment Trends report estimates that some 74.5 million youth were unemployed globally in 2013, with an unemployment rate of 13.1 per cent. Locally, the average annual youth unemployment increased to 37.7 per cent (see chapter on Labour Market). The female youth unemployment rate (48.0 per cent) remained higher than males. This section examines the policies, programmes and activities targeting the youth cohort of the population.

Policy and Programmes

The revision of the National Youth Policy continued under the **Youth Development Programme (Phase 1)** with the approval of the Concept Paper by Cabinet. Subsequent to this, the Green Paper was drafted for eventual submission.

The **National Centre for Youth Development (NCYD)** was established with the support of Youth Act and is guided by a mission to "provide leadership for youth development through partnership with stakeholders" and to "directly and indirectly provide the enabling conditions under which youth become productive, creative, confident and independent thinking citizens, who are knowledgeable about their rights and responsibilities, and are making use of available opportunities". In an effort to promote youth development, the NCYD continued with prior activities while at the same time initiating new partnerships.

The NCYD's Youth Information Centres (YIC) continued to provide information and act as a developmental space for youth. The NCYD reported that approximately 55 000 to 60 000 youth utilize the YIC annually. Construction of the Clarendon and Spanish Town YICs is nearly completed. The YICs were established to provide youth with access to credible information and assistance concerning personal and professional development; guidance and counselling; and a platform for self-expression using the creative and performing arts.

The Ministry of Youth & Culture (MYC) with support from the United Nations Children's Fund (UNICEF) implemented the creative arts/sports life skills programme "Innovative Sports and Arts for Youth Improvement Programme (I SAY I)" for children and youth in conflict with the law and most At-Risk Young Persons. The I SAY I programme seeks to support juvenile offenders, children in conflict with the law and probationers with relevant life skills through creative arts and sports therapy. The programme was implemented in three correctional facilities and two probation sites. These included the Horizon, Hill Top, Metcalfe Street, Diamond Crest and Rio Cobre facilities.

The MYC through the NCYD continued to engage youth in employment and entrepreneurship programmes. Approximately 6 500 unemployed youth were trained in the Diageo Learning for Life Programme. Areas of training included front office reception, bartending, bar supervision, food preparation, catering, customer service and business administration.

Non-Formal Training

The **National Youth Service (NYS)** continued its mission of developing a strong youth citizenry by engaging 5 974 youth compared with 5 224 in 2012. The programmes offered by the NYS sought to equip youth aged 17–24 years with life coping skills which aided in their personal and professional development while heightening their cultural awareness and civic participation.

The NYS Corps Programme's curriculum exposed 547 youth to specialized skills training and work experience to enhance employability skills for personal and career development. In addition, the NYS improved the employability skills of 3 784 participants (706 females) of the National Summer Programme through voluntary work experience. To build on the notion of volunteerism, youth were engaged in character building activities through the Summer Enrichment Programme. This programme saw 179 youth benefitting (108 females) in four parishes.

Camp Empowerment, another activity on the NYS agenda, targeted youth with mild intellectual disabilities, with the aim of building personal and professional development skills while exposing participants to potential career routes. Camp Empowerment benefited 35 youth (14 males). During the year, the NYS piloted the Graduate Work Experience Project (GWEP). Eleven graduates with a first degree were able to develop themselves professionally through workshops and work experience. The programme resulted in the placement of 42 participants of which 32 were females. The NYS embarked on a programme to offer entrepreneurial training through the Entrepreneurship Camp which provided training to 48

participants. These participants are expected to start up and manage a registered business by the end of the programme.

Youth also benefited from the Financial Assistance programme which provides grant assistance to post-service participants who are pursuing tertiary education. Throughout the year, 475 students received up to 20.0 per cent of the tuition payment. Further to this programme, the NYS through the Access to Higher Education Partnership Project (AHEPP), partnered with the Northern Caribbean University (NCU) and contributed to the financial assistance of 47 students (36 females) to pursue tertiary studies at the NCU.

Youth Support

The **Kingston YMCA** Youth Development Programme engaged students in family life education, life skills, academic development and pre-vocational skills such as information technology, lifesaving skills (lifeguard programme), welding and barbering. The barbering programme continued to be a collaborative effort with the Jamaica Co-operative Credit Union League which provided financial support. Extra-curricular or recreational activities also formed part of the programmes offered by the YMCA, and these included aquatics, badminton, taekwondo, football, leadership training, and counselling. In addition to these, adults with disabilities were catered to through the YMCA's Special Needs Programme which delivers hands-on practical experiences, life coping skills, remedial classes, arts and craft, and computer training. As part of its mandate, the business of the Boys' Town Schools and Training Centre continued to be the responsibility of the Kingston YMCA.

Approximately 200 youth were engaged in the Leadership Training Programme for a period of ten weeks, and after a successful interview were assigned to the summer camp as counsellors. The summer camp was sponsored by the NYS with support from the private sector. Motivational sessions led by the Rotary Club of Kingston and the Brotherhood of the Bethel Baptist Church continued throughout the year.

It was reported that 23 students from the Youth Development Programme were successful in the Grade Nine Achievement Test and gained placement at various technical high schools. To achieve the objectives of the Aquatics Programme to encourage the development of a healthy lifestyle through swimming, approximately 2 000 persons were trained to swim and the YMCA organized a swimming competition in conjunction with Burger King. Some 750 children from 36 preparatory and primary schools participated in the YMCA/Burger King event. To promote self-defence and self-discipline, 95 adults and children were trained in taekwondo.

Youth were also supported by the **Jamaica 4-H Clubs**[5] which continued to provide training in the areas of agriculture, leadership and social skills, home economics, environmental awareness and healthy lifestyle. The Jamaica 4-H Clubs reported that 77 495 persons were registered across 989 clubs islandwide. Of this amount, approximately 5 700 were female youth. Participants (27) were trained in the Tractor Operation & Maintenance Programme, 23 persons were trained in the Meal Preparation Programme, while 13 participants were trained in the Cake Baking & Decorating Course. Throughout the year 83 168 clubbites were trained, with 23 779 receiving training in agriculture, 38 971 in home economics, and 14 529 received training in leadership skills.

Senior Citizens (60 years and over)

Senior Citizens constituted approximately 11.9 per cent of the Jamaican population, with 52.2 per cent of the 323 500 persons being females (STATIN). The programmes and initiatives for senior citizens continue to be guided by the National Policy for Senior citizens, Vision 2030 Jamaica, and international convention. The National Council for Senior Citizens (NCSC), an agency of the MLSS, continued its collaboration with government, non-government, and international partners to offer services and support to senior citizens in accordance with its mandate. The NCSC participated in several national events, as well as represented the Jamaican government at regional and international events.

The interventions of the NCSC at the parish level are carried out through senior citizens clubs. There were 556 senior citizens clubs islandwide, five less than that of 2012. The reduction in the number of clubs was due to death of members and members not having sufficient financial resources for transportation to meetings. St. James had the largest number of active clubs at 116, followed by St. Catherine with 85, then St. Andrew with 79. The active membership stood at 20 609 (75.7 per cent female), and 3 380 members were shut-ins. Some 3 420 volunteers (2 625 females) assisted with the activities of the clubs. During the year, the NCSC Secretariat initiated an audit of the clubs, which was ongoing at year-end. Senior citizens clubs islandwide partnered with faith-based organizations, the private sector, and non-governmental organizations to implement several of their activities. The areas of intervention by the NCSC included education (lifelong learning), health, income security, provision of and referrals to services, and contributing to sustaining national infrastructure.

Education programmes geared towards mental stimulation of seniors included the annual national Bible Quiz and Spelling Bee competitions. Cultural Day activities were also held in each parish, giving seniors the opportunity to showcase their talent and display artefacts to the younger generation, thus facilitating inter-generational transfer of knowledge. A School Debate Competition under the theme "Seniors are an Asset, not a Liability" was also held. A total of 126 seminars and fora, with 3 090 participants (2 189 females), were held to educate seniors on relevant issues and provide them with helpful information. The areas covered included wills, land title, volunteerism, disaster preparedness, elder abuse, community safety and road safety, housing solutions, conflict resolution, modern farming techniques and utility bills. Seniors were also educated about programmes of assistance such as the Programme of Advancement Through Health and Education (PATH) and the National Insurance Scheme (NIS). The agency conducted 14 retirement seminars under the theme "Retirement is a Process not an Event: Be Prepared". The target group was persons 18 years and older, with emphasis on persons in the micro/small business sector. A total of 490 persons participated (392 females). Some 132 senior citizens were trained in basic computer skills, facilitated at parish libraries and the NCSC office. A total of 62 culinary art and craft exhibitions were also held at parish libraries, displaying the work of senior citizens. The NCSC also assisted 86 students at the secondary and tertiary levels with school assignments related to ageing.

5 The Jamaica 4-H Clubs target persons aged 5 years and over.

With regards to health interventions for the elderly, 74 health clinics were held with 2 632 persons benefiting from blood pressure and blood sugar checks, eye screening, foot care, nutrition counselling, dental care, general medical assessment, and alternative medicinal therapies such as massage and reflexology. Some 62 health-focused workshops were held, with 1 903 persons being beneficiaries of personal health care, blood sugar and pressure testing, registration for National Health Fund (NHF) and Jamaica Drugs for the Elderly Programme (JADEP), counselling, skills to cope with grief, and stress relief exercises. Information was disseminated on drug abuse, proper handling of food, cholera prevention, sexuality and the older adult, HIV/STI, control of chronic diseases, and how to maintain a healthy lifestyle. Some 23 health fairs were held with 2 954 persons in collaboration with MOH, Social Development Commission, Lions Club and Northern Caribbean University. A total of 63 health seminars with 3 012 participants (2 525 females) were also held islandwide. The areas of focus included stress management, prostate cancer, sexually transmitted diseases, men's health issues, alternative medicine, chronic illnesses, mental health, population growth, sanitation, biological ageing, proper nutrition, poison prevention, garbage disposal, benefits of physiotherapy, and the dangers of smoking. Sports Days were held in all parishes, as well as the National Games, to promote active ageing among seniors.

In an effort to strengthen income security among this segment of the population, opportunities were created to foster the participation of senior citizens in income generating activities. These included handicraft, preserves, pastries, confectionery, beverages, farming of cash crops with emphasis on backyard gardening, animal husbandry, horticulture, poultry rearing, straw craft, needlecraft, beekeeping and sale of dry goods and toiletries. A total of 790 skills training workshops were held with 9 050 participants. The best items at the various workshops were submitted for judging at the annual Culinary, Art and Craft Competition. Seniors and volunteers were also encouraged to market their products to supplement their pensions and income.

The NCSC continued to operate a feeding programme that provided hot meals during the week for some needy seniors in 20 communities in Kingston and St. Andrew. Some 117 987 cooked meals and 4 373 food packages were provided to beneficiaries of the Meals on Wheels programme. Senior citizens organizations in the rural parishes provided 2 864 meals to shut-ins and persons attending the Day Activity Centres. They also provided 487 food packages during public holidays. Another service initiative, the Home Help Programme, accounted for 1 376 visits to 258 beneficiaries in rural parishes.

Some 1 457 senior citizens received concessionary bus pass/identification (ID) cards. This allowed persons 60 years and over to access concessionary fares on the Jamaica Urban Transit Company (JUTC) buses and the Metro Bus Company in Montego Bay, St. James. The Metro Bus Company also offers services to Falmouth, Trelawny and Sandy Bay, Hanover. The identification cards system for senior citizens was extended to all parishes in 2013. In addition to concessionary bus fares, the ID cards will also allow senior citizens to access other benefits such as discounts on some items at pharmacies and supermarkets.

The NCSC made 7 312 referrals compared with 6 650 in 2012. The majority of referrals was made to the National Health Fund, Bus Pass/Identification, and the Jamaica Drug for the Elderly Programme (Table 25.4).

TABLE 25.4
NATIONAL COUNCIL FOR SENIOR CITIZENS REFERRALS, 2013

PROGRAMME	NO. OF REFERRALS MADE
NIS	912
Poor Relief	76
JADEP	1 401
NHF	1 568
Public Assistance	306
Bus Pass (ID)	1 457
PATH	1 015
Food for the Poor	63
Ministry of Health - Clinics/Hospitals	117
Other Agencies	397
TOTAL	**7 312**

Source: National Council for Senior Citizens

Senior citizens were involved in building and sustaining national infrastructure and institutions through community participation, systems of care and protection for the elderly, and the integration of issues of ageing and senior citizens into national planning. Community projects included beautification of green areas, plastic bottles collection, feeding of street people, repairing of homes, and donation of houses to the less fortunate. They also assisted needy students with text books, lunch money, and bus fare, and interacted with children in Early Childhood Institutions, Primary, and High Schools. The NCSC Parish Organizers also participated regularly in community and inter-agency meetings including those of the Social Development Commission, Rural Agriculture Development Authority, National Housing Trust, Co-operative Credit Unions, Jamaica 4-H Clubs, Ministry of Health, and the Bureau of Women's Affairs. The populace was sensitized through seminars, fora, and small group presentations on the Council's programmes and policy. Seniors also engaged in interviews and presentations featured in the print and electronic communications media.

Senior Citizen's Week was observed in September under the theme "Seniors, an Asset to National Development". Activities such as church services, concerts, tree planting, recreational events and educational trips were held across the parishes. The week's activities also included the observance of National Grandparents Day. On October 1, the International Day of Older Persons was also observed with various activities, including a forum supported by HelpAge International, and civic functions honouring senior citizens in their communities. Centenarians were specially celebrated throughout the year, with the NCSC recording 416 such persons (389 females).

Persons with Disabilities

The 2001 Population and Housing Census data estimated that approximately 6.0 per cent of the population were persons with disabilities[6]. Similar data from the most recent census (2011) is not yet available. The Jamaica Council for Persons with Disabilities (JCPD), an agency of the MLSS, remained the lead agency for policy and coordination of programme

6 The 2011 Population and Housing Census data on Persons with Disabilities is not yet available.

implementation for persons with disabilities. The work of the JCPD and the MLSS was guided by the National Policy for Persons with Disabilities and Vision 2030 Jamaica. Disability-focused NGOs and the private sector continued to support the government in advocacy and service provision for persons with disabilities.

The promotion and protection of citizen rights, as well as economic empowerment and social inclusion, remained the areas of focus for interventions by and on behalf of persons with disabilities. The JCPD continued to focus on knowledge transfer awareness and sensitization, through various forms of public education and outreach including symposia, seminars and meetings. Disability Awareness Week in December was commemorated under the theme "Break Barriers, Open Doors for an Inclusive Society for All". The JCPD partnered with UNICEF to launch *the State of the World's Children Report 2013*. The focus of the report was on children with disabilities. Public education and promotional activities included health and wellness fairs, career development expositions, and exhibitions of craft items made by persons with disabilities in various parishes.

During the year, 10 688 persons with disabilities registered with the JCPD. The JCPD provided Rehabilitation Grants to registered persons with disabilities to support areas such as assistive aids, farming, school and medical expenses, and small business development. A total of $4.9 million was disbursed to 588 clients (264 males) over the year. The majority of grants (249) was provided for school related expenses (school/administrative fees, boarding fees and school books), amounting to a total of $2.5 million.

Work continued under the IDB-supported project, Support to Improve the Lives of Persons with Disabilities, to create a comprehensive registry of persons with disabilities, as a base for effective policy formulation and supportive interventions. Since inception of the project, approximately 10 000 persons were registered up to December. The project also funded capacity building and training of practitioners and parents involved in early stimulation of children with disabilities. The Disabilities Bill underwent further reviews and amendments including comments from the Attorney General's Chambers to which it was submitted twice during the year.

In June, the GOJ signed a grant agreement with the World Bank (Japanese Policy Human Resources Development Grant) for approximately US$3.0 million to implement the Social and Economic Inclusion of Persons with Disabilities project. The signing was part of the launch and two-day conference on Labour Market Inclusion of Persons with Disabilities. The general objective of the project is to support the efforts of the GOJ to improve human capital and reduce poverty through investment in vulnerable groups, particularly persons with disabilities. It is expected to contribute to a greater understanding of the employment needs and skills of persons with disabilities and an improved preparedness to meet the special education needs of young children with disabilities. More specifically, it will increase the employability and skills development of persons with disabilities (ages 18–36); and improve service delivery to children with disabilities between 0 and 6 years. Among the anticipated programme beneficiaries are persons with disabilities from PATH households, and the Early Stimulation Progamme of the MLSS.

The Early Stimulation Programme (ESP) of the MLSS continued to provide services geared to young children with developmental disabilities, and their families, and had 1 472 active clients (58.6 per cent male) at year-end. Of the total number of active clients, 645 were admitted during the year. The interventions offered included home visiting and centre-based stimulation. The ESP referred 280 children (178 males) for specialised assistance in the areas of physiotherapy, orthopaedics, special education, inter alia. In October the MLSS and the Digicel Foundation signed an MOU aimed at providing an improved learning environment for children with disabilities who are beneficiaries of the ESP. of PATH and other vulnerable children from lower socioeconomic backgrounds benefitting from the services of the Early Stimulation Programme (ESP).

The MOU provided for the rehabilitation and equipping of the Stimulation-Plus (STIM-PLUS) Early Childhood Development Centre in Rockfort, East Kingston, which is the sole state-operated basic school for children with developmental disabilities.

The NGO community continued to provide supportive services to persons with disabilities including children and youth. The areas of service provision include skills training and community-based rehabilitation. The **Abilities Foundation** continued to provide skills training and certification for its target clientele over the year. Some 82 persons received training (51 males). Males dominated the areas of Data Operations/General Office Administration (16:1); Furniture Making (20:0); and Horticulture (11:1). Females were mostly enrolled in Housekeeping (14:1). The programmes of the Foundation were supported by Food for the Poor and the School Feeding Programme in the area of welfare needs. Technical and funding support continued to be received from the MLSS and the HEART Trust/NTA.

A total of 396 persons (225 males) 0–18 years in St. Catherine, Manchester, St. Elizabeth and St. James were served by Community Based Rehabilitation Jamaica (CBRJ) during the year. Of those receiving intervention, 65.9 per cent was children 6–15 years old. The majority of the clients (86.9 per cent), particularly those with severe or multiple disabilities, received home-based interventions. The remainder were served in the early intervention and therapeutic centre based programme. The interventions provided by CBRJ are guided by international standards and guidelines including those of the United Nations and the World Health Organization, to ensure that all children and adolescents with disabilities have access to services that enhance their growth and development and improve their quality of life.

Gender

Government remained committed to the principles of gender equality and women's empowerment. Consequently, several measures to promote gender balance were undertaken, with the primary emphasis on policy development and implementation, gender mainstreaming, the empowerment of women and gender-based violence. The Bureau of Women's Affairs (BWA) is charged with the responsibility for gender issues and the implementation and monitoring of global commitments towards gender mainstreaming. The gender agenda was advanced through efforts of non-governmental organizations (NGOs), community based organizations (CBOs) and academia. Additionally, the Bureau, in keeping with the goals of the National Policy for Gender Equality (NPGE), advocated for the creation of an enabling legal/regulatory framework to facilitate policy development and implementation. Work was advanced towards the enactment of legislation to provide greater protection and redress to the Jamaican citizenry, particularly the most vulnerable and underserved.

Gender Mainstreaming

In keeping with the priority policy areas outlined by the NPGE and the Vision 2030 Jamaica: Gender Sector Plan, the

BWA undertook gender mainstreaming activities within ministries, departments and agencies (MDAs) of government to mainstream gender in all policies, plans, programmes and projects. This exercise continued to be implemented through funding support from the United Nations Entity for Gender Equality and Women's Empowerment (UN Women). The implementation of the NPGE was significantly bolstered by "The Way Out: Women's Economic and Political Empowerment" project. In addition, through technical support from the BWA, Gender Focal Points (GFPs)[7] were engaged in sustained gender mainstreaming activities in keeping with action plans specifically crafted within the respective MDAs. In 2013, 106 GFPs from 72 MDAs were trained, and four quarterly monitoring and evaluation sessions were held for all the GFPs in an effort to track the timely implementation of the specific Gender Action Plans. Consequently, 22 GFPs have developed and received approval for their Action Plans and have now qualified to use the Gender Equality Certification Stamp. Certification was awarded to MDAs that had appointed GFPs, sustained participation in at least 80.0 per cent of gender mainstreaming training, developed an action plan to implement aspects of the NPGE, and had received approval from the respective heads of the MDAs.

In order to promote awareness of the gender mainstreaming process, copies of the NPGE were disseminated to several groups of persons including Permanent Secretaries, various heads of agencies and gender focal point personnel. The Jamaica Information Service (JIS) also updated its website with the finalized version of the Policy, and in collaboration with the BWA, launched a public education campaign. The campaign outlined the objectives and the implementation strategies of the NPGE and was implemented from March to September 2013.

Partnerships

Through the partnership between the BWA and the Dispute Resolution Foundation (DRF), private sector and civil society organizations (CSOs) were more deeply engaged in the gender mainstreaming process in 2013. A two-day Gender Summit for the private sector and CSOs was held in July. This was used as a medium to strengthen the gender knowledge of the participants, to increase the BWA's reach to private sector and civil society organizations and to create an opportunity for the promotion of other key gender based policy initiatives such as the National Anti-Sexual Harassment Policy and the National Strategic Action Plan to Eliminate Gender-Based Violence (NSAP-GBV). Further engagement with the public sector saw the BWA partnering with JAMPRO under the DFID CART Fund project to operationalize the Jamaica Coalition of Service Industries. The BWA conducted five focus group discussions among representatives from various service sectors, namely medical tourism, ICT and the creative arts. As a result, the BWA supported the integration of a gendered perspective in the implementation of the three-year Service Sector Strategy and Expansion Plan.

The Bureau sought to support women's social and economic empowerment through other strategic partnerships and collaborations. Twenty-five public education activities and 13 health and information fairs were held across the island with key stakeholders including: faith and community based organizations; the Ministry of National Security (MNS); the Jamaica Social Investment Fund (JSIF); the Ministry of Health; the Rural Agricultural Development Authority (RADA); the Centre for the Investigation of Sexual Offences and Child Abuse (CISOCA), among others. A total of 5 145 individuals were reached, and a deliberate attempt was made to include male participants in the urban areas. Issues such as healthy lifestyle, economic opportunities, positive sexual behaviour, gender equality, justice and human rights were brought to the fore.

The Bureau continued to provide support to initiatives of several women's groups. Support was given to the Jamaica Women's Political Caucus (JWPC) to host the Annual Madam Rose Leon Lecture Series in March; the UNFPA and the Bureau assisted the Women's Resource & Outreach Centre (WROC) with a three-day training workshop for 15 young men under the theme "Real Man Lik Out Gainst GBV"*;* technical support was also provided to the Jamaica Household Workers' Union (JHWU), to look specifically at increasing advocacy towards the adoption of Convention 189, which addresses the Decent Work Agenda. Entrepreneurial mentorship and leadership training sessions were held in Kingston and St. Andrew with 30 women who expressed an interest in boosting their capacities in the management of small businesses. Under the FEMPOWER Leadership Programme, training sessions in leadership and decision-making were conducted with young women. Two consultations were held in Hanover and Kingston, respectively with 43 women, to gain beneficiary input towards the development of a women's resource manual. The manual is intended to provide comprehensive, detailed and engaging information to women and girls who are unable to access services and resources, as well as act as a guide towards improving health, wealth and well-being.

With respect **to research and data collection,** the BWA has been engaged in the process of standardized data collection methodology through the Gender Equality Observatory for Latin America and the Caribbean (GEOLAC), which was created by the United Nations Economic Commission for Latin America and the Caribbean (ECLAC). This is in keeping with the UN Statistical Commission's role to promote the development of national statistics and improve the coordination of the statistical work of specialized agencies. Efforts were also made to further the development of the Gender Equality Observatory for Jamaica (GEOJ) in line with the Government of Jamaica's commitment to data collection and analysis, through the creation of a unique gender database. A Memorandum of Understanding (MOU), which guides the operations of the Jamaica Crime Observatory (JCO), was signed between the Ministry of National Security and the BWA in September. The MOU signals the government's commitment to facilitate data-collection and data-sharing protocols among key stakeholders and is intended to operationalize the JCO. This will assist the Bureau in the collection of sex-disaggregated data and to establish links between the victim and perpetrator as well as to facilitate evidence-based policymaking and violence prevention activities.

During the year, significant focus was placed on reducing the incidents and prevalence of **gender-based violence.** A public awareness forum hosted by the BWA, the New Jersey Sterling Law Firm and the UNFPA was held on November 25 in observance of International Day for the Elimination of Violence against Women (IDEVAW). The forum was designed

7 Gender Focal Points are appointed public sector personnel who are responsible for developing, implementing and monitoring gender sensitive policies, plans, programmes and projects within the public sector. The main responsibility of the Focal Points is to mainstream gender in and throughout their respective ministry, department and agency.

to sensitize and build awareness around the issue of gender-based violence and was used to launch the observance of 16 Days of Activism against gender-based violence across the island. The forum was held under the theme, "Ending Violence against Women and Girls" and saw the participation of 180 stakeholders. The Planning Institute of Jamaica also mounted an exhibition and presentation from November 25 to 27, to commemorate IDEVAW.

The draft National Strategic Action Plan to Eliminate Gender-based Violence (NSAP-GBV), which was prepared by the BWA with funding support from UN Women, was designed to facilitate a coordinated programme to prevent and eliminate gender-based and other forms of violence within a human rights based framework. In keeping with the priority areas of the NSAP-GBV, the government continued to address the issue of violence against women and girls through increased advocacy to improve the mechanisms and policies in place. This included the reform of existing legislation and the crafting of new laws to meet the needs of emerging trends. In addition, public education and sensitization sessions were conducted to facilitate increased awareness towards eliminating the scourge of gender-based violence. In light of this, an Inter-disciplinary Committee was established within the Office of the Prime Minister to address the issue of gender-based violence, including sexual exploitation of women and girls and trafficking in persons. Through support from UN Women, work was advanced to finalize the NSAP-GBV. The Office of the Prime Minister also facilitated discussions in May on the legislative agenda and the way forward regarding Jamaica's progress on the accession to the Optional Protocol to the Convention on the Elimination of All forms of Discrimination Against Women (CEDAW), and the National Anti-Sexual Harassment Policy which will be used to inform the creation of the Anti-Sexual Harassment legislation in 2014.

Advocacy and awareness-raising were integral to the sustainability of the initiatives to eliminate gender-based violence. The School's Education Programme (SEP), which was implemented by the BWA in five schools across Kingston, St. Catherine, Clarendon and St. James, utilized a participatory and interactive approach to challenge notions of gender inequality in an effort to effect sustained attitudinal and behaviour change. The workshops were held from May to June, and a total of 404 students (317 females) participated. Capacity building training for guidance counsellors and deans of discipline were conducted in four education regions, where participants were provided with practical strategies towards violence prevention and treatment within the wider school community. The Bureau also hosted 11 sexual violence strategy workshops in the parishes of St. Andrew, St. Catherine, St. James, Hanover, Clarendon, and Manchester. Over 398 persons (294 females) were sensitized on issues relating to sexual abuse and domestic abuse as major barriers to women's safety and empowerment. First level interventions were also conducted with 191 clients (183 females), who called the BWA or walked in for services or information. Cases included incidents of domestic violence, information regarding the division of property, maintenance and child support; as well as enquiries on available social services. Most of the clients were referred to social service agencies such as, CISOCA, the Crisis Centre, Victim Support Unit and PATH.

In keeping with the objective of the NPGE, the Bureau continued to address the needs of men and boys, through the promotion of gender equality, information sharing, and gender training. In observance of International Men's Day on November 19, the Bureau conducted a male leadership session under the theme *Keeping Men and Boys Safe*. Approximately 90 men benefited from discussions held in Mandeville and Montego Bay, which centred on the achievements as well as the challenges that men faced. Particular focus was placed on male involvement in abuse, both as perpetrators and as victims. In response to rural poverty, income generation was one of the key initiatives during the year. Under the JSIF/REDI project, the Jamaica Hardanga Heritage Trust (JHHT) started the implementation of their eco-tourism project, while the St. Thomas Women's Agricultural Initiative (STWAI) set up and implemented their protected agricultural project. These projects were not only geared towards rural income generation but also aided in the promotion of poverty reduction.

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 adolescents and young adults by promoting healthy sexual and reproductive health practices. These services were offered through seven main centres and nine outreach centres islandwide. The administration of the programme for adolescent mothers remained the core of the Foundation's activities and in 2013, served 1 404 adolescent mothers, 775 of whom were new students. A total of 460 students were returned to the formal school system by the close of the year and an additional 179 teen mothers were placed in other institutions of learning or skills training. Services to young fathers were offered through the Baby Fathers Counselling Programme. Some 167 fathers were counselled and referred to other agencies, such as the Ministry of Justice's Diversion Programme, to which 26 young men were recommended. Other achievements over the period included training of peer counsellors from schools in the Kingston Metropolitan Area and parental education and counselling services to the parents of the teenage mothers. Due to under-subscription, the Foundation had to discontinue offering cosmetology training for females and males within the 17–25 age cohorts in the 2nd quarter of the school year. However, six individuals were trained to operate businesses of their own or to enroll in more advanced skills training programmes. Other aspects of the WCF programme included the provision of nursery services at the seven main centres/outreach sites, which served to facilitate the mother–child bond. Some 717 babies benefited from this programme. Additionally, 55 babies and toddlers were cared for at the Chubby Cheeks nurseries which operate for the benefit of working mothers in Kingston and St. Elizabeth. The pre-school facility which is operated solely in Montego Bay served 170 students.

The National Policy for the Reintegration of School-Age Mothers into the Formal School System was approved by Cabinet in June. It is anticipated that with the implementation of the policy, enrolment in the Programme for Adolescent Mothers will increase, and reintegration into the formal school system will be a smoother process. In 2013, the WCJF Programme was recognized as a best practice by the United Nations Population Fund (UNFPA) in the *Report of State of the World Population 2013*. The Foundation was also showcased at the multi stakeholders high level consultation on the Reduction of Adolescent Pregnancy in the Caribbean, held in Trinidad in December.

Education and Research

In the area of education, the Institute for Gender and Development Studies (IGDS), Mona Unit continued to offer undergraduate and postgraduate courses in gender and development and by so doing supported the implementation of NPGE, the Vision 2030 Jamaica – National Development Plan and the University of the West Indies' Strategic Plan 2012–2017. As the IGDS celebrated its 20th anniversary, enrolment in gender courses increased to 1 158 students from

1 011 between 2012 and 2013 (890 females). Fourteen gender courses were delivered over three semesters and enrolment in the Bachelor of Science degree in Gender and Development increased to 300 students, with 58 new students enrolling in September 2013. Nine of the 251 registered in 2012 graduated in November 2013. Gender courses were offered to students registered for the Bachelor of Arts in Early Childhood Education programme at the Shortwood and Bethlehem Moravian Teachers' Colleges, these courses served to increase awareness of gender issues in education, especially in the development of the curriculum and teaching methodologies. The Institute also continued to supervise postgraduate students in the Masters and MPhil/PhD programmes.

The IGDS expanded its research agenda to look specifically at gender and economic development; gender and climate change; and gender, leadership and governance. The Institute in collaboration with the Jamaica Household Workers Union (JHWU) implemented a project entitled *Advance Decent Work for Domestic Employees in Jamaica*. The project was commissioned by UN Women and the Ministry of Labour and Social Security and the main deliverable was to collect data to support the ratification and implementation of ILO Convention 189: Decent Work for Domestic Employees. Activities included a baseline study and a situational analysis of Household Workers in Jamaica. Action research on gender equality in leadership and governance continued through a number of activities including, tracking the progress of graduates from the *Advancing Transformational Leadership for Gender Justice in the Caribbean* project, which was funded by the UN Democracy Fund and UN Women; and by supporting the 51% Coalition's research and advocacy programme on quotas as a special temporary measure. In an effort to mainstream gender and age in climate change and rural development, the Institute in collaboration with the Sir Arthur Lewis Institute of Social and Economic Studies (SALISES) and the Department of Government undertook research for the Agricultural Cooperative Development International and Volunteers in Overseas Cooperative Assistance (ACDI/VOCA). ACDI/VOCA is a nonprofit international economic development organization that delivers technical and management assistance in agribusiness, financial services, enterprise development, community development and food security.

Research and publications were geared towards increasing awareness and demonstrating inequalities resulting from learned gender roles. Two edited Working Papers on gender and reproductive health, and gender and climate change were published in December. The Institute collaborated with several institutions and the media to raise awareness on gender and development issues. The activities to commemorate International Women's Day on March 8 were held in conjunction with the UWI's Mary Seacole Hall. Similarly, on May 6, the Institute partnered with the Mona School of Business and Management and the Women's Leadership Initiative to host a public lecture on *Women's leadership: transforming self, community and country* by former US Ambassador Pamela Bridgewater. In recognition of IDEVAW, a panel discussion in collaboration with Chancellor Hall Uplifting Brother Club was held. In response to the findings of an earlier study conducted for the UWI Health Centre — with funding from the Ford Foundation, and to support the National HIV/STI programme and the UWI's Sexual Safety Policy — the Institute developed a funding proposal and started implementation of a small sexual safety outreach programme, targeting male and female adolescents. The aim was to reduce HIV/STI risks while forming and maintaining healthy sexual relationships. The programme is being implemented in collaboration with the Hugh Wynter Fertility Unit and the UWI's Health Centre and Wellness programme. In an effort to mainstream gender within the university, the Gender Mainstreaming Action Plan was developed and approved by the Campus Registrar; sensitization sessions, the appointment of 10 gender focal points across various faculties and departments, and institutional research were executed towards the implementation of the Action Plan. A draft Gender Policy was also prepared for review and updating by the IGDS.

Women's Media Watch Jamaica (WMW) also expanded its education agenda through the delivery of training programmes to some 162 persons (114 females). Women's economic and political empowerment took centre stage, and the WMW Jamaica through its training sessions encouraged debate on, and increased gender sensitivity towards women in leadership. Training sessions in gender and leadership were delivered to 50 individuals (39 women). Likewise, sessions on gender and HIV, and media, gender and development were delivered to youth leaders, business leaders, media practitioners, civil society organizations and leaders from faith based organizations.

Community Development

The issue of community development continued to be a focus for the government and to this end, initiatives were undertaken to improve the social and physical conditions in a number of communities islandwide. The initiatives have been spearheaded mainly by the Jamaica Social Investment Fund (JSIF), Social Development Commission (SDC), Planning Institute of Jamaica (PIOJ) and the Social Services Department in the Ministry of Transport, Works and Housing in collaboration with a number of non-governmental organizations (NGOs).

The **Jamaica Social Investment Fund (JSIF)** continued to implement its poverty reduction agenda through community development interventions. Some 78 sub-projects were approved by the JSIF's Board of Directors, at an approximate cost of $1.2 billion, with an anticipated 40 674 beneficiaries. The vast majority of the projects approved were in the areas of basic infrastructure (30) and social services (26) {Table 25.5}. During the year, a total of 150 projects were completed at a total cost of approximately $2.3 billion, of which $394.2 million represented contributions from the beneficiary communities. As with the approved projects, the completed projects were mainly in the areas of social infrastructure (48) and social services (46). An estimated 89 795 persons were beneficiaries of the completed projects. Since inception in 1996, JSIF has approved 1 690 projects, with 1 340 completed. JSIF's total contribution over the 17-year period was approximately $9 676.3 billion (Table 25.6).

Sub-projects were implemented under the following eight loan/grant supported projects: Inner City Basic Services Project (ICBSP); Community Investment Project (CIP); Japanese Social Development Fund (JSDF); European Union Poverty Reduction Programme II (PRP II); European Union Poverty Reduction Programme III (PRP III); Rural Economic Development Initiative (REDI); Basic Needs Trust Fund 6 (BNTF 6); and Petro Caribe Development Fund (PDF). The ICBSP, PRP II and JSDF were closed during the year. The BNTF 6, while not fully achieving close-out status,

TABLE 25.5
JAMAICA SOCIAL INVESTMENT FUND
STATUS OF PROJECTS, 2013
(Value and Cost in $Million)

Sector	Number Approved	Value of Projects Approved	Total Project Cost	Number Completed Projects	Value of Completed Projects
Social Infrastructure	30	618.2	685.1	48	1 187.5
Economic Infrastructure	1	67.0	67.0	17	283.2
Social Services	26	259.9	287.0	46	298.9
Organizational Strengthening	7	25.1	33.7	9	52.9
Special Projects	3	3.0	3.6	3	21.7
Equipping	11	44.0	87	27	55.8
TOTAL	**78**	**1 017.2**	**1 163.4**	**150**	**1 900.0**

Note: Value refers to JSIF cost
Total project cost includes the community contribution
Discrepancies are due to rounding

Source: Jamaica Social Investment Fund

substantively completed all activities. The outstanding activities encompass local institutional strengthening.

The JSIF's contribution to crime prevention continued to be carried out under the ICBSP, JSDF and the PRP II and III programmes. During the year, the ICBSP contributed to the infrastructural and social development of 12 pre-selected communities[8] islandwide. The ICBSP activities included: basic infrastructure projects in the areas of road and water services; installation of information and communications technology (ICT) for parish councils; sanitation; drainage; construction and rehabilitation of recreational facilities; and the replacement of zinc fencing with alternative perimeter fencing. The public safety component of the project, which represents the broad areas of social programming, reached approximately 10 741 persons during the year. The areas of intervention continued to be mediation and conflict resolution; alternative livelihood and skills development; family support services; youth education and recreation; and community capacity development and public awareness. A total of $758.6 million was disbursed under these projects for 68 008 beneficiaries. The JSDF continued to contribute to community engagement in the 12 inner-city communities covered under the ICBSP Project. The focus was on community action planning, skills development, literacy, and alternative livelihood creation. Approximately $32.9 million was disbursed in 2013 for 2 836 beneficiaries.

The main focus of the PRP II was on equipping and rehabilitating ECIs and primary schools. The project also funded the equipping of a golden-age home and construction of community centres and sanitation facilities. The education and capacity building component included psychosocial empowerment for parents and families, skills and academic promotion, vocational training scholarships, and youth empowerment through music and culture. A total of $239.5 million was disbursed under PRP II, benefiting 6 646 persons.

TABLE 25.6
JAMAICA SOCIAL INVESTMENT FUND
STATUS OF PROJECTS
(Value and Cost in $Million)
Cumulative 1996–2013

Sector/Area	Number Approved	Value of Projects Approved	Total Project Cost	Number Completed	Value of Completed	Total Project Cost
Social Infrastructure	892	9 083.4	1 0131.2	781	6 352.9	7 163.8
Economic Infrastructure	219	2 740.5	3018.5	201	2 352.5	2 570.0
Social Services	378	1 484.7	1 979.8	215	685.2	965
Organizational Strengthening	140	215.7	267.9	110	178	219.7
Special Projects	10	48	50.2	3	21.7	26.7
Equipping	44	111	164.8	30	86	103.6
Economic Projects	7	22.1	24.8	0	0	0
TOTAL	**1 690**	**13 705.4**	**15 637.2**	**1 340**	**9 676.3**	**11 048.8**

Note: "Value" refers to Jamaica Social Investment Fund (JSIF) cost
"Total Project Cost" includes the community contribution

Source: Jamaica Social Investment Fund

8 The communities are Flanker in St. James; Bucknor in Clarendon; Central Village, Tawes Meadows, Shelter Rock, Africa, Lauriston and Knollis in St. Catherine; and Jones Town, Whitfield Town, Passmore Town and Federal Gardens in Kingston and St. Andrew.

The PRP III, which supports the implementation of the Community Renewal Programme (CRP), disbursed approximately $58.9 million on project activities geared towards physical transformation of communities, governance, and socio economic and youth development interventions. Some 521 persons benefited.

The PDF also supported the implementation of the CRP, by facilitating the construction of sanitary units in four schools in Clarendon, St. Thomas and Westmoreland. During the year, approximately $88.9 million was disbursed under the PDF, benefiting 739 persons. Under BNTF 6, infrastructural and rehabilitation support was also provided to vulnerable communities in nine parishes (St. Andrew, St. Catherine, St. Thomas, Portland, St. Elizabeth, Manchester, Westmoreland, Clarendon and St. Ann); with 9 651 beneficiaries. Specific areas of involvement include: road repairs; water supply upgrading; school construction, expansion and/or rehabilitation; fencing and equipping of educational facilities; skills training centre construction; and electrical supply upgrading. A total of $213.2 million was disbursed.

Rural development activities were again supported by the REDI and CIP projects. The REDI provided support for entrepreneurial training and capacity building, organizational strengthening, infrastructural development and rehabilitation, and marketing of products. The focus of REDI remained strengthening the capacity of rural residents in the areas of agriculture, product development and community tourism. A total of $173.9 million was disbursed under REDI, with 2 082 persons benefiting. Approximately $221.9 million was disbursed under CIP in 2013, benefiting 15 372 persons in poor rural communities. The CIP contributed to improvements to basic social and economic infrastructure, social services, and organizational strengthening interventions. These included upgrading of sanitation systems and road repairs, inter alia.

The **Social Development Commission (SDC)** is the principal community development agency working with Jamaica's 783 communities. The agency focuses on effective governance structures, community level planning and interaction through sport. The local participatory **governance framework** was strengthened with the formation and revitalization of 206 governance groups, thus bringing the total complement of active local governance structures to 3 914 inclusive of 3 368 community based organizations (CBOs); 476 Community Development Committees (CDCs); 56 Development Area Committees (DACs); 13 Parish Development Committees (DACs); and the Portmore Advisory Council. Some 364 groups (176 CBOs, 155 CDCs, 27 DACs and 6 PDCs) were assessed using SDC's standardized Assessment Forms and processes. The assessment and reorientation of the six PDCs (St. Catherine, Westmoreland, Manchester, Clarendon, St. Elizabeth and St. James) were completed in collaboration with the National Association of Parish Development Committees and the Local Government Reform Unit of the Ministry of Local Government and Community Development. Another 425 groups received training in a number of areas including meeting management, records management, financial management and project management.

Community Development Committee conferences were held islandwide to discuss the Local Government Reform process including the tenets of the proposed legislature. A total of 1 300 persons attended these conferences. Two series of Participatory Accountability and Responsibility (PAR) fora were held across all parishes to enable community representatives to assess the work of the SDC during the fiscal year and to make recommendations on actions to be undertaken in the subsequent work planning period.

The **Interagency Networks (IANs)** were established in 2012 primarily to improve the quality of service delivery to residents through effective and efficient collaboration among service providers. All parishes except St. Mary, and Kingston and St. Andrew have a functional and vibrant IAN; however both parishes were working with their respective local authorities to establish their IAN. Although the listing varies across parishes, the core agencies involved in the IANs include local authorities, 4-H, Ministry of Education, Restorative Justice, HEART, Department of Correctional Services, Ministry of Labour/PATH, National Centre for Youth Development, HEART-Trust NTA, Victim Support Unit, Jamaica Foundation for Life Long Learning, Women's Centre, Ministry of Health, National Council on Drug Abuse, Jamaica Constabulary Force Community Safety and Security Branch, Jamaica Cultural Development Commission, Parish Library, Registrar General's Department, Rural Agricultural Development Authority, Family Court, PDC and Jamaica Public Service Company Ltd.

The Governance Capacity Grant Fund (GCGF) was established to provide monetary support to local governance groups in areas of organizational development, advocacy, promotion of local governance groups and collaboration with local authorities. The fund was launched in June, with four calls for applications made during the period. To date, 35 groups have received grants totalling approximately $2.4 million.

The **Research** Division continued its efforts towards establishing and maintaining a database of community maps and profiles (community/parish/development area) comprising spatial, social, economic, governance and environmental information to inform local and national level planning, programme and policy development. The Commission, in partnership with the Statistical Institute of Jamaica, continued its review and redefinition process of the 783 communities islandwide. The communities would facilitate the development of a consistent and accurate national grid of communities for the sharing of data with key stakeholders for use in local and national development plans and initiatives. Islandwide consultations were held with the community and stakeholders to share the SDC's definition of community and the existing community boundaries, and to garner feedback. As a result, community boundaries were redefined for 493 communities across the island.

The division also developed asset maps for 473 communities and community boundary shape files for 520 communities. Additionally, 71 community profiles were completed or updated during the year, resulting in 83.0 per cent of the 783 communities having completed profiles available. Twelve of these profiles were completed under the SDC/Citizens Security and Justice Programme (CSJP) II partnership and focused on volatile and vulnerable communities across five parishes. Some 199 summary profiles[9] were created and 61 of these were made available on the Commission's website. The SDC also completed two development area profiles and finalized four parish profiles. Additionally, a number of observation sheets, poverty assessments, profile validations and listings updates were also completed. Work continued on the development of the Geographic Information Systems database, with 520 maps being completed or updated.

9 Summary Profiles are abridged versions of the full community profiles, and allow for wider dissemination of the data.

The SDC continued to promote **Community Development Planning** with 174 training sessions (147 with community representatives) being held on various topics such as project proposal writing, project management, Community Priority Plan (CPP) development and advocacy/human rights. Some 66 CPPs were completed during 2013. To date, there are 242 CPPs and two Development Area plans available to guide planning across the island.

As a part of the thrust to support communities with their health promotion and encourage healthy lifestyle, 86 community social service fairs were held with approximately 13 000 beneficiaries**.** These fairs are aimed at linking the communities with key social services such as health services, passport, tax registration numbers and birth registration. SDC also continued to populate its database of volunteers that currently has in excess of 1 900 members. The database is a strategic tool used to engage those community members who would like to give back by volunteering their time and skill. Twenty-one "Call to Duty" projects were implemented in collaboration with a number of partners including Food for the Poor, Adventist Disaster Relief Agency, SDC staff members, private citizens and local level stakeholders.

Community Sports continued to be an effective tool for mobilizing and engaging communities and 382 teams from nearly 400 communities islandwide participated in the seventh renewal of the SDC's National Community Cricket 20/20 Competition. The winning teams were required to utilize 15.0 per cent of the prize money to implement at least one community project. The competition also offered scholarships tenable at the G.C. Foster College of Education and Sport. Consequently, one member of the winning team for 2013 (Junction/Bull Savannah) is currently pursuing studies in Coaching at the diploma level at the institution. Some 70 children from the Maxfield Park, Strathmore Gardens, The Nest and Granville Children's Homes were hosted at the finals. In addition, $400 000.00 from the gate receipts from the finals was donated to the Child Development Agency to assist with the operations at these homes. In partnership with Petroleum Corporation of Jamaica, the SDC staged its inaugural *National Community Netball Competition*; Mandeville United (Manchester) emerged champions followed by Phoenix Strikers (Portland), Westchester (St. Catherine) and Catherine Mount (Portland). The netballers were also engaged in varying behaviour modification exercises such as anger management and grooming workshops.

Community-level **local economic development** has become one of the priorities of the SDC as this is critical to fuel economic growth and job creation, thus enhancing community development on different levels. Under this initiative, a parish community local economic development initiatives database was developed with information on 13 parishes. This was then consolidated into one to form a national database comprising 117 community-level local economic initiatives. During the period, 16 new community economic initiatives were started by community groups. Some 27 entrepreneurship workshops/seminars and training were conducted with over 1 400 persons benefiting islandwide. The workshops were geared towards enhancing the entrepreneurial skills and increasing self-reliance within communities. Additionally, there were five business development fairs which created linkages within the various sectors such as financial institutions. During the period, 46 project proposals were submitted to various institutions for funding, of which 11 were approved. The approved projects have a combined value of approximately $45.0 million and are primarily in the area of agriculture (6), agro processing (2), furniture making (1), candle making (1) and production of organic fertilizer (1). The projects are being implemented in six parishes, namely KSA (2), St. Thomas (1), Portland (5), Hanover (1), Westmoreland (1) and St. Elizabeth (1).

In fulfillment of Goal 3 of Vision 2030 Jamaica, Community Month 2013 was celebrated under the theme: "A prosperous Economy starts with my Community". A total of 19 community projects were implemented at a cost of $3.0 million. Overall project goals included:

- Creation of linkages and promotion of a local network formation towards developing local economies
- Re-channeling of energies of unattached youths into meaningful entrepreneurial activities
- Support to educational outcomes through infrastructure and nutritional development.

To implement all projects the SDC leveraged its partnerships with varying ministries departments and agencies. Of note, the PIOJ's Community Renewal Programme gave support to the completion of projects in the select parishes of St. James, Clarendon, St. Catherine, and Kingston and St. Andrew.

The addition of the Community Action for Improved Educational Outcomes programme to the SDC's community development portfolio arose from the 2011 Ministry of Education's published results of the Grade 4 Numeracy and Literacy test. Due to the low levels of mastery in literacy and numeracy, an intervention geared towards linking the community to local schools with a view to broadening support systems available to educational institutions were developed. There were interventions in 116 schools across the island, which centred on activities such as improving/enhancing the school plant, improving the nutrition of targeted students, strengthening of Parent Teachers' Associations and school development plans, as well as improved parenting skills through workshops. While the emphasis is on primary and all-age schools, other schools such as early childhood institutions and post primary institutions also benefited from this intervention.

The **Community Renewal Programme** (CRP) continued its coordinated interventions in Majesty Gardens and undertook preliminary work in 17 other Phase 1 communities[10]. In the pilot community of Majesty Gardens, CDC members received training in a number of areas including good governance, records management, meeting management, proposal writing and accounting. The Community Development Education Programme was implemented in Majesty Gardens by the Jamaican Foundation for Lifelong Learning (JFLL). There was also the assessment of business skills and commencement of entrepreneurial training for small business in the community, by the Jamaica Business Development Corporation. Implementation of a programme to target at-risk men and women with linkages to gangs also commenced. With respect to the other Phase 1 communities, a

10 These 17 other communities are Central Downtown, Delacree Park, Denham Town, Fletchers Land, Franklin Town, Greater Allman Town, Greenwich Town, Hannah Town, Jones Town, Parade Gardens, Rae Town, Rose Gardens, Seaview Gardens, Springfield Gardens, Tivoli Gardens and Trench Town.

major consultative meeting was held, to garner preliminary information on the communities and to sensitize the communities to the work of the CRP and its partners. Other initiatives included:

- support for the participation of community entrepreneurs in the Trench Town Trade Fair
- the partnership with the police, SDC and the Ministry of National Security to develop a community scorecard for community policing, and the completion of assessments by the SDC in 14 communities
- community profile assessments in eight communities
- support for community outreach summer camps held by the police
- creation of partnerships with a number of public and private sector entities and NGOs, to support the work of the CRP.

Three health fairs were held in Majesty Gardens, Seaview Gardens, and Trench Town as part of the drive to improve the health status of residents in the targeted communities and to strengthen the health promotion approach as per Vision 2030 Jamaica. Under the Poverty Reduction Programme (PRP) III, projects were completed in 27 of 40 CRP communities targeted for intervention and interventions will continue among the remaining communities under PRP IV. Through the Inner City Basic Service Project (ICBSP), an assessment was conducted in eight communities identified for intervention. Additionally, the design of phase II of the USAID Community Empowerment and Transformation (COMET II) project was completed and will target 25 CRP communities.

During the year the Social Services Department in the Ministry of Transport, Works and Housing continued to identify and relocate citizens at risk to safe and secure areas in collaboration with the MLSS, Food for the Poor, Office of Disaster Preparedness and Emergency Management, Red Cross, Political Directorate and JSIF. The technical assessment of damage due to the passage of Hurricane Sandy in 2012 continued with 476 cases (298 in Portland and 178 in Eastern St. Thomas) being assessed. Of this number, 292 cases (170 in Portland and 122 in Eastern St. Thomas) were confirmed as requiring assistance and were provided with housing units under a programme with Jamaica Emergency Employment Programme and Food for the Poor. The Crooked River Relocation Project in St. Mary was completed and 25 housing units delivered to victims from Port Arthur Lane and its environs, while another four were relocated to Darlingford in Portland. The West Albion Relocation Project effected under the Tropical Storm Gustav Restoration Programme, continued with the delivery of grants to aid in the construction of housing units. Under this programme a further 21 grants were delivered, bringing the total grants delivered to date to 147. Some 897 cases were investigated and approved under the social housing component of the Constituency Development Fund, which is administered by the ministry. Benefits totalling approximately $3.0 million were paid out. The poverty alleviation intervention for at-risk families continued under the ministry's Social Housing Programme Special Assistance Scheme, with 57 benefits inclusive of 49 grants valuing just under $2.1 million and eight housing units being disbursed islandwide.

The activities of eight strata corporations/ management committees were monitored and assistance provided where necessary. Some 46 meetings were held with residents around various issues including: arrears management; peril insurance coverage for individual and common areas; payment of property taxes; uses and value of certificates of title; and access to funding for small businesses. Conflict prevention/resolution services were also provided to the following communities:

- Rectory Lands, Clarendon
- Flanker, St. James
- Darlingford, Portland
- Foreshore Road – Vanzie Lands, Trelawny
- Galleon Beach, St. Elizabeth
- West Albion, St. Thomas
- Windsor Heights, St. Catherine
- 35 Waltham Park Road; and Arnett Gardens – Schemes 8 and 9, St. Andrew.

In addition, one health fair was organized during the year at Duhaney Park Housing Scheme.

Local Government

The Ministry of Local Government and Community Development (MLGCD) continued its implementation of programmes under various themes to improve the delivery of service at the local level and enable Local Authorities (LAs) to better manage their affairs. The three pieces of draft legislation governing the scope and power, the financing and financial management, and the management of human resources of the LAs were submitted to the Office of the Chief Parliamentary Counsel (CPC) for the preparation of the Bills. The latest draft of the National Building Bill was reviewed and sent to CPC and further drafting instructions on regulations under Clause 91 of the Building Act 2013 were issued. The Bill provides a modern legal framework for the effective regulation and management of buildings and building related activity, to ensure safety in the built environment and promote sustainable development.

In the area of governance, the ministry collaborated with the SDC to engage citizens of Portmore to discuss recommendations contained in the final report of the Portmore Municipality review. Support was provided to the Parish Development Committees as they executed a number of activities throughout the year. Some 25 persons were trained as Municipal Police Officers and deployed to the parishes of Westmoreland, St. Elizabeth and St. Mary. The Municipal Police assist in enforcing municipal laws and regulations, maintaining public order, supporting revenue generating efforts, and helping in disaster management activities.

Under the **Local Economic Development (LED) Programme**, LAs in collaboration with local stakeholders and relevant national external partners, formulated and executed appropriate strategies and programmes for maximizing local economic growth which will have a positive impact on job creation and poverty reduction. The MOU between the Government of Jamaica and the Caribbean Local Economic Development (CARILED) to begin implementation of the programme was signed in April. Implementation commenced in the parishes of Westmoreland, Manchester, Clarendon, St. Catherine and Kingston, and in the municipality of Portmore.

The Financial Management and Accounting System (FMAS) was installed in the St. Catherine and St. Ann Parish Councils. This implementation increased to nine the number of LAs with the FMAS system. The ministry also implemented an advertising campaign to increase communication with citizens on the importance of paying property tax. For the period

January to December, approximately $5.6 billion was collected from property taxes. Additionally, the islandwide property revaluation project was completed. An electronic database system was implemented in the LAs to effectively manage and monitor the streetlights islandwide. An islandwide streetlight audit and a database with the complement of streetlights for each parish were completed. Global Positioning System equipment was also purchased and utilized by all LAs to effectively manage streetlights in their jurisdiction.

With regards to infrastructure development, the Black River, Linstead and the Rocky Point Markets were rehabilitated and 943 critical drains were cleaned across all parishes. The LAs continued to provide care for the elderly in the infirmaries. Under the new Charities Act, two Friends of the Infirmary Charities were established in Hanover and St. Elizabeth to facilitate donations to these institutions in order to enhance the delivery of social assistance to this vulnerable group. A ward was constructed at the Hanover Infirmary and improvement works carried out to the physical structure of the Manchester and St. James infirmaries. The Manchester Infirmary received an industrial stove from the Manchester Parish Council.

The MLGCD in its capacity as Secretariat for the Caribbean Forum of Local Government Ministers (CFLGM) lobbied for recognition of the agreement establishing the CFLGM. They also engaged member territories on actions within their respective Cabinets and discussed with CARICOM the challenges experienced in seeking recognition by that body. The ministry also continued to support the work of the Commonwealth Local Government Forum (CLGF). The Minister of Local Government and Community Development was also re-elected to the Board of the CLGF and promoted to its Executive Committee.

Implementation of various activities continued under the Enhancing Civil Society Participation in Local Governance for Community Safety project. The project started in March 2011 and was initially slated to end in March 2013. However, it was extended to March 2014. Under the project, a Parish Safety and Security Committee (PSSC) was established in St. Ann, Portland, St. Thomas and Hanover. Divisional PSSCs were established in the Petersfield, Whitehouse and Bethel Town communities by the Westmoreland PSSC. Capacity building workshops were held for all 12 PSSCs in an effort to develop the capability of parish stakeholders to address safety and security issues in their respective parishes. Parish safety maps were created for St. Ann and Portland and will be used by the PSSCs in identifying priority areas to be addressed in enhancing safety and security in the respective parish. Approximately three safety audits each were conducted in each of the seven PSSCs to identify safety issues and develop strategies to address them. Brochures on Crime Prevention through Environmental Design (CPTED) and safety and security tips were circulated. St. Catherine PSSC launched a gender based campaign “Real Men Don’t Rape” to highlight the high incidence of rape and abuse in the parish, discourage the behaviour and encourage persons to report such incidents.

SOCIAL PROTECTION

Work was advanced on some key legislation that will strengthen the social protection system and enhance inclusiveness of vulnerable populations. Review of the draft National Assistance Bill, which will modernize the legislative framework for the delivery of social welfare, continued with the involvement of key stakeholders. The review and refinement of the National Disabilities Bill also progressed, with the expectation that the draft Bill would proceed to the Legislation Committee of Cabinet within the year. During the year, steps were taken towards reviewing and strengthening the National Insurance Act of 1965. Efforts continued on the drafting of the country’s first Social Protection Strategy, to create a conceptual underpinning and comprehensive programmatic framework for delivery of social protection. The draft strategy will provide a strategic direction for stakeholders. During the year, two regional consultations were conducted with key stakeholder agencies as part of the extensive review and finalization of the draft document.

Under the **Social Protection Project** (GOJ/World Bank 2008–2013), an Impact Evaluation of PATH conducted by Sanigest International was completed. While the findings reinforced the positive impact of the programme on school attendance and preventive health care within client households, they indicated no impact of the differentiated benefit levels on school retention. A Targeting Assessment of PATH was also completed, as well as a model for recertification of PATH families. A recertification exercise was conducted of approximately 38 000 PATH families, the intention being to provide data for analysis for a proposed graduation and exit strategy. Consultations regarding the PATH graduation strategy, as well as documentation of data and research were advanced, with a draft proposal prepared. Work also advanced on the reform of the public service pension system, with a White Paper being approved by Cabinet in October, and tabled in Parliament in December. Social protection research and efforts were further supported throughout the year by other projects, focusing on unemployment insurance studies, support to social and economic inclusion of persons with disabilities, and registration of persons with disabilities. Funding and technical support was provided for these initiatives through the Inter-American Development Bank (IDB).

The preliminary data on the prevalence of **poverty,** estimated by the 2012 Jamaica Survey of Living Conditions, was 19.9 per cent nationally, reflecting a continued increase in poverty trends since 2008. Poverty rates in Rural Areas declined from 23.2 per cent in 2010 to 21.3 per cent. The rate in the Kingston Metropolitan Area increased to 19.7 per cent from 14.4 per cent. In Other Towns, there was also an increase to 16.6 per cent from 11.6 per cent. Trends in major economic sectors such as tourism and bauxite mining over the period since 2008 continued to impact the employment and productivity of households, thereby influencing lower levels of consumption. Improved agricultural productivity since 2010, as well as a net increase in mining and quarrying, would have contributed to the decline in rural poverty. The government established the Poverty Reduction Coordinating Unit in the PIOJ in December, to streamline the efforts at addressing poverty through the development of a new policy and programme. Figure 25.1 portrays the trends in overall and regional poverty prevalence over 10 survey years.

Social Assistance Programmes

PATH continued to provide bi-monthly cash transfers to families, with an increase in benefit amount effected in August. The average increase to most beneficiary categories was 15.0 per cent, with a 67.0 per cent increase in the amount for the Elderly category. Over the year, the total amount expended on benefit payments to client families was $3.78 billion. The programme made changes to its post-secondary grant initiative, moving from a single grant amount for all applicants, to grant amounts ranging between $15 000.00 and $50 000.00, for different levels of certification. Between January and October, PATH allocated $23.5 million to post-secondary assistance grants, with 308 males and 648 females benefiting. Clients from Clarendon (259) were the largest proportion of beneficiaries at 27.1 per cent, with disbursements totalling $6.4

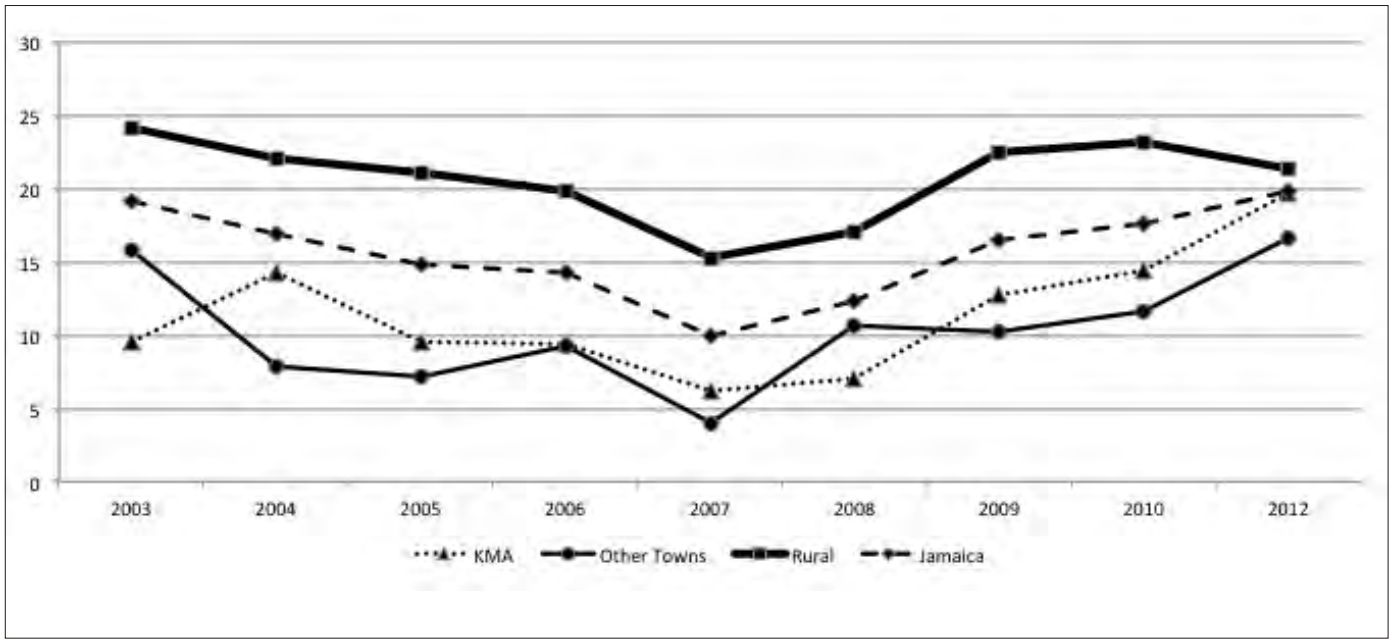

FIGURE 25.1: PREVALENCE OF POVERTY FOR ALL JAMAICA AND REGIONS, 2003–2012

million. This was followed by Kingston with 16.2 per cent (155 clients) and St. Andrew with 12.7 per cent (121 clients).

Registered beneficiaries on PATH as at the end of December stood at 371 243 persons (Table 25.7a) compared with 407 607 the previous December. There were 275 278 children receiving benefits, remaining the largest category of beneficiaries; this was followed by the Elderly at 63 056 persons. Some 11 545 persons from the Poor Relief and Public Assistance systems also received their benefit payments through PATH. St. Catherine with 53 581 clients and Clarendon with 47 073, followed by St. Andrew with 45 638 persons, were the parishes with the largest numbers of registered beneficiaries. Some 318 402 clients were paid in the December payment period (Table 25.7b). A notable comparison with the registered numbers was the Education category, where 80.2 per cent of those registered were actually paid in that period. Differentiated benefits continued to be paid to male students, and to children in the transition grades (Grades 7 and 10).

The **Steps-to-Work** Programme continued as the main welfare exit programme, having scaled up operations to include PATH families in all parishes. Over the year, it was further determined that the programme would become an integral pillar of the proposed efforts towards empowering families to graduate from the welfare system, through participation in targeted interventions aimed at facilitating their participation in the labour market. Collaboration was further strengthened with several agencies including the HEART Trust/NTA, the Jamaican Foundation for Lifelong Learning, the Jamaica Agricultural Society (JAS), Jamaica Business Development Corporation (JBDC), among others, to solidify arrangements for the delivery of training and development services for clients. Notable among these was the training of over 600

TABLE 25.7A
PATH BENEFICIARIES BY PARISH AND CATEGORY
REGISTERED, DECEMBER 2013

PARISH	Health (0 -under 6 yrs)	Education (6-17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston	2 480	9 456	1 847	540	79	215	673	**15 290**
St. Andrew	6 979	27 905	6 309	1 384	194	874	1 993	**45 638**
St. Thomas	3 319	11 445	2 945	742	144	572	332	**19 499**
Portland	2 655	8 656	2 962	588	109	341	786	**16 097**
St. Mary	4 020	14 279	4 200	716	153	537	503	**24 408**
St. Ann	2 537	14 558	4 910	752	74	686	900	**24 417**
Trelawny	2 769	9 125	2 637	401	64	296	430	**15 722**
St. James	2 661	11 853	2 740	532	63	416	1303	**19 568**
Hanover	2 530	8 306	3 182	606	64	352	654	**15 694**
Westmoreland	4 095	15 593	4 610	836	160	617	353	**26 264**
St. Elizabeth	2 814	15 381	6 265	951	111	718	507	**26 747**
Manchester	2 618	12 029	4 510	693	86	609	700	**21 245**
Clarendon	7 777	27 755	8 057	1 388	273	785	1 038	**47 073**
St. Catherine	8 391	33 292	7 882	1 458	194	991	1 373	**53 581**
TOTAL	**55 645**	**219 633**	**63 056**	**11 587**	**1 768**	**8 009**	**11 545**	**371 243**

Source: Ministry of Labour and Social Security

TABLE 25.7B
PATH BENEFICIARIES BY PARISH AND CATEGORY
PAID, DECEMBER 2013

PARISH	Health (0 – under 6 yrs)	Education (6 – 17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston	2 405	7 264	1 552	540	79	117	673	**12 630**
St. Andrew	6 788	21 359	5 468	1 384	194	482	1 993	**37 668**
St. Thomas	3 259	9 161	2 751	742	144	420	332	**16 809**
Portland	2 626	7 334	2 779	588	109	259	786	**14 481**
St. Mary	3 959	11 485	3 970	716	153	424	503	**21 210**
St. Ann	2 462	10 833	4 408	752	74	479	900	**19 908**
Trelawny	2 745	7 481	2 443	401	64	231	430	**13 795**
St. James	2 605	8 978	2 385	532	63	245	1 303	**16 111**
Hanover	2 475	6 696	2 877	606	64	244	654	**13 616**
Westmoreland	4 009	12 816	4 199	836	160	401	353	**22 774**
St. Elizabeth	2 753	12 398	5 856	951	111	537	507	**23 113**
Manchester	2 566	11 018	4 185	693	86	472	700	**19 720**
Clarendon	7 676	23 251	7 635	1 388	273	576	1 038	**41 837**
St. Catherine	8 195	25 967	6 899	1 458	194	644	1 373	**44 730**
TOTAL	**54 523**	**176 041**	**57 407**	**11 587**	**1 768**	**5 531**	**11 545**	**318 402**

Source: Ministry of Labour and Social Security

farmers from PATH families in Good Agricultural Management Practices by the JAS, which was also contracted to manage a Revolving Pig Project (RPP).

Approximately 300 out of a proposed cohort of 650 clients have received training in basic Business Management through the JBDC. Between January and December, 498 clients established or expanded micro enterprise ventures through the support of the Steps-to-Work Entrepreneurship Grant Initiative, at a cost of $44.0 million. Some 55.0 per cent of Grant Recipients were involved in retail trading, 32.0 per cent in crop and livestock production, another 9.0 per cent in apparel and furniture manufacturing, and the remaining 4.0 per cent in services.

In September, 254 Steps-to-Work clients referred to the HEART Trust/NTA were confirmed to be participating in skills training courses in six parishes, through direct entry. In addition, 140 clients were participating in an experimental series of Customized Courses designed to facilitate the training and certification of beneficiaries whose numeracy and literacy levels preclude direct entry into programmes offered through the National Training Agency. The multi-agency initiative integrates delivery of basic education and behaviour modification/life skills with vocational skills development. The clients are expected to qualify for certification in Cosmetology, Food Preparation, Early Childhood Development, Front Office Operations and Motor Vehicle Engine Systems. Clients were also successful in housekeeping training.

Over the period July to August, 511 secondary school drop-out students (320 males) aged 15–17 years from PATH families were hosted at the annual Summer Intervention aimed at reintegrating them into the formal school system. Day camps were facilitated in eight parishes, while one residential camp was held in rural St. Andrew, and hosted cohorts from five parishes. The camps offered remediation and assessments in basic education, interventions geared toward behaviour modification and introductory training in a range of vocational skill areas. Post-intervention Diagnostic Assessments were carried out by the HEART Trust NTA on 366 participants (229 males). Some 35.0 per cent of the males and 40.0 per cent of the females qualified at the Grade 9 level. Some 420 or 82.0 per cent of participants were reintegrated into the education system (including the Career Advancement Programme, and HEART) by December.

The **Rehabilitation Grant Programme** implemented through the Public Assistance Division of the MLSS continued to provide rehabilitation, compassionate and emergency assistance to citizens across the island, as an integral aspect of the country's safety net. For the year under review, the MLSS disbursed $18.6 million through *Rehabilitation grants*, to 934 clients (611 females). This reflected a 28.0 per cent overall decline in numbers over the previous year. Kingston, at 577 persons (363 females) continued to outweigh all other parishes in terms of the number of clients served. This was some 61.8 per cent of all Rehabilitation grant clientele. St. Ann with seven and Hanover with nine recorded the least number of clients for this programme. In terms of disbursements, Kingston received some $11.1 million, estimated at 59.7 per cent of the programme expenditure. *Compassionate grants* were paid out to 5 024 persons across the island, with the parish of Kingston again recording the largest number of clients at 3 405 persons (1 580 females). The number represented 67.7 per cent of all clients for this grant. Some $95.7 million was expended on this programme; with Kingston receiving 67.5 per cent. The total expenditure recorded an increase of some 19.9 per cent compared with the previous year. *Compassionate grants* were disbursed to 5 024 clients (2 589 females). The vast majority (3 405) of clients was in Kingston, constituting 67.8 per cent of the total number. The number of clients reflected a 15.9 per cent increase relative to the previous year. The amount expended on this grant category for the year was $95.7 million compared with $79.8 million in 2012. Some $64.6 million, or 67.5 per cent, was expended in Kingston. *Emergency grants* were paid out to 507 clients (284 females), with a disbursement of $8.6 million. Kingston clients numbered 165 (91 females). Kingston led the disbursement amounts with 31.6 per cent of the total, followed by Westmoreland with 9.9 per cent, and St. James with 8.2 per cent. The *Education and Social Intervention grants* were expended to the tune of $8.2 million, reaching 460 clients across the country. Some 283 clients (195 females) were from Kingston, representing 61.5 per cent of the total. The total represented a decline of some 17.0 per cent relative to the

TABLE 25.8
BENEFICIARIES OF PUBLIC ASSISTANCE BY PROGRAMME AND PARISH, 2013

	REHABILITATION		COMPASSIONATE		EMERGENCY		EDUCATION AND SOCIAL INTERVENTION		TOTAL	
PARISH	**No.**	**Amount ($)**	**No.**	**Amount ($)**	**No.**	**Amount ($)**	**No.**	**Amount ($)**	**No.**	**Amount ($)**
Kingston & St. Andrew	577	11 141 500	3405	64 558 571	165	2 722 052	283	5 446 550	4 430	83 868 673
St. Thomas	61	1 057 500	80	1 789 000	32	580 000	12	188 500	185	3 615 000
Portland	30	583 000	70	1 226 500	25	426 325	14	191 470	139	2 427 295
St. Mary	20	448 000	42	939 000	14	251 915	0	0	76	1 638 915
St. Ann	7	119 380	42	818 000	21	329 896	2	28 705	72	1 295 981
Trelawny	14	280 000	27	630 000	19	315 000	0	0	60	1 225 000
St. James	26	553 547	158	2 808 500	42	704 068	0	0	226	4 066 115
Hanover	9	303 000	21	460 000	31	490 000	2	3 500	63	1 256 500
Westmoreland	15	292 500	24	490 000	50	851 370	3	53 100	92	1 686 970
St. Elizabeth	39	857 912	71	1 407 700	26	386 621	6	96 765	142	2 748 998
Manchester	18	355 000	143	2 803 630	16	298 000	10	167 953	187	3 624 583
Clarendon	45	1 103 547	389	7 251 686	33	594 978	40	468 080	507	9 418 291
St. Catherine	73	1 547 050	552	10 520 300	33	644 014	88	1 539 500	746	14 250 864
Total	**934**	**18 641 936**	**5 024**	**95 711 887**	**507**	**8 594 239**	**460**	**8 184 123**	**6 925**	**131 132 185**

Source: Ministry of Labour and Social Security

previous year; St. Mary, Trelawny, and St. James had no clients in this programme.

The **Social Intervention Programme (SIP**) (formerly Youth Empowerment Strategy) continued to be implemented through the MLSS, by way of two distinct categories: the Education and Entrepreneurship Grants Programme (EEG) and the Jamaica Emergency Employment Programme (JEEP) (for the latter see chapter on the labour market). The EEG is geared towards assisting persons who are unemployed, including "at-risk' and unattached youth. The programme supports funding for clients' education or entrepreneurship activities. Clients are between the ages of 16 and 35 years. They are provided with tuition grants for certain educational interventions, or grants for entrepreneurship activities including business starts, stock purchases and partnership arrangements. For the year under review, $8.2 million was disbursed through education grants to 163 females and 73 males. Of the amount, some $3.2 million went to tertiary-level clients; these included 39 females and 16 males. At the secondary level, $5.9 million was disbursed to 112 females and 57 males. Approximately $548 000.00 was disbursed to 12 female applicants, in the area of skills training. With respect to the Entrepreneurship grants, just over $732 000.00 was disbursed to nine persons (6 males). The areas of interest were in trading, agriculture and manufacturing.

The **Board of Supervision** (BOS) is mandated through the Poor Relief Act 1886 to supervise the provision of the Local Authority's welfare services to the poor in Jamaica. The programmes are implemented islandwide, and include the Indoor, Outdoor and Temporary Relief Programmes. The Indoor programme is effected through 13 parish infirmaries (residential care institutions) and the Kingston and St. Andrew Golden Age Home. The facilities provide for client's medical care and upkeep, including food and accommodation. At the end of the year, some 1 452 persons (870 males) were in residence. Kingston and St. Andrew (KSA) had the greatest number of clients at 457 (257 males), followed by Clarendon with 140 (79 males) and St. Catherine with 135 (93 males). During the year, 184 males and 114 females were admitted, and 18 males and 5 females were discharged; while records showed that 172 males and 101 females had died while in the care of the institutions. Records indicate that there was no client under 20 years of age; some 111 persons (58 males) were between 20 and 39 years; 321 clients (158 males) between 40 and 59 years; and the majority, 1 020 clients was in the elderly category (644 males). Males outnumbered females in the elderly category in every parish. Some 30.6 per cent of these males were in Kingston and St. Andrew. The KSA also housed 42.0 per cent of females in the 60 and over category. Expenditure on the Indoor Programme was estimated at approximately $228.9 million for the year. These costs were attributed to medicine, food, transportation, burial, clothing and bedding, and the upkeep of buildings, equipment and utilities. Food, at some $101.7 million, was the largest expenditure item, followed by Utilities at $51.7 million. Of the $23.2 million spent on Sanitation for the year, $15.0 million was spent by the KSA. Expenditure on Transportation islandwide was some $4.4 million, of which KSA spent 75.0 per cent. Overall, KSA led in expenditure for the year at $99.1 million, followed by St. Catherine with $21.9 million, and Clarendon with $16.9 million.

At the end of December, the **Outdoor** Programme had 11 689 clients on register, of whom 6 074 were females. KSA accounted for 2 375 persons (1 303 females), followed by St. Catherine with 1 304 (658 males) and St. James with 1 257 persons (651 males). Over the year, 1 162 persons had been added to the clientele (659 males), while 659 persons had died (372 males), and 452 clients had been struck from the register (257 females). Of the number registered for the programme, 509 were under the age of 20 years (256 males); 1 688 were between 20 and 39 years (945 females); 3 307 were between 40 and 59 years (1 726 females); and the majority was 60 years and older (6 185; 3 153 females). **Temporary** Relief was received by 580 persons over the year, at an expenditure of $3.0 million. Males at 317 outnumbered females, the largest number being from St. Catherine (82). The greatest expenditure was on 126 clients, half of them male, in KSA, totalling $1.2 million. Some 140 clients in St. Catherine were served to the tune of just over $290 000.00.

There were 3 776 **children** on the registered poor rolls, 1 903 of whom were males. Some 3 405 of these children (1 706 females) were dependents of adult registrants, while 371 (204

males) were registered in their own names. Some 21.6 per cent of children registered in their own name were in the parish of St. James, followed in rank order by KSA with 19.4 per cent, and Hanover with 13.1 per cent. Kingston and St. Andrew, Portland, Hanover and St. Catherine had the largest numbers of children as dependents of Poor Relief clients, with 743, 530, 429 and 325 respectively. The data showed no children in residential homes for the poor. The **Homeless population** known to the BOS was recorded for the year at 1 221 (983 males). Of these, 197 were on the register of the poor, which included 140 males. Some 222 received shelter care (177 males), while 351 persons (279 males) received Other Care services. About 451 street persons were not participating in the Street Care, of whom 387 were males. Kingston with 181, and St. James with 98, accounted for the majority of these males.

Under the **Indigent Housing** Programme 1 031 houses were built or repaired islandwide, in collaboration with Food for the Poor, and the Constituency Development Programme. Of the number, 888 houses of indigent persons were repaired, 645 of these in the parish of St. Elizabeth. Some 143 houses were built during the year, 96 of these in St. Ann. The Poor Relief Imprest supported the programme to the tune of $403 408.00, while the combined other funding totalled $103.8 million.

Social Security

As an important element of the coverage of social protection to citizens, Jamaica has continued to engage in **bilateral social security reciprocal agreements.** These currently include the United Kingdom, CARICOM, Canada, and Quebec. Four such agreements are currently in existence. The purpose of these agreements is to enable countries to coordinate their social security programmes, thereby protecting certain social security rights earned by citizens and migrants; provide for continuity of coverage; and ensure equality of treatment. The agreements are based on four fundamental features: equality of treatment regardless of nationality or citizenship; elimination of dual coverage (overlap of insurance periods); totalization of contribution periods; and facilitation of the export of benefits.

The **National Insurance Scheme** (NIS) continued to provide benefits to contributors through several categories of benefits. The total number of NIS beneficiaries receiving pensions for the year stood at 97 716, an increase of 13.2 per cent compared with 2012. Only the categories of Orphan/Special Child and Special Anniversary showed a decrease in numbers relative to 2012, the latter because of natural attrition[11]. The Old Age category of pensions had the largest number of beneficiaries, and at 72 015 (40 265 females) showed an increase of 17.5 per cent vis-a´-vis the previous year. St. Andrew had the largest number of Old Age pensioners at 18 459, followed by St. Catherine with 13 943 (Table 25.9).

The **National Insurance Fund** (NIF) supports the financing of the National Insurance Scheme. The statement of financial position (unaudited) at the end of December recorded Net Assets of $65.5 billion, a decrease of some 9.2 per cent compared with 2012 figures. Investment Income recorded a loss of $220.2 million, spurred mainly by a loss on Investments of over $4.0 billion. Interest income and Dividends also fell in comparison to the previous year. In relation to Investments, the NIF portfolio was dominated by the GOJ Fixed Rate Accreting Notes of $24.7 billion, followed by Foreign Exchange bonds at $12.1 billion and Investment Properties at $9.3 billion.

TABLE 25.9
NATIONAL INSURANCE PENSIONS AND EMPLOYMENT INJURY BENEFITS, NUMBER OF BENEFICIARIES, 2013

TYPE OF BENEFIT	NO. OF RECIPIENTS
Old Age	72 016
Invalidity	5 844
Widows/Widowers	18 339
Orphan/Special Child	26
Special Anniversary	11
Employment Injury/Disablement	1 437
Sugar Workers	45
TOTAL	**97 718**

Source: Ministry of Labour and Social Security

TABLE 25.10
NATIONAL INSURANCE FUND INCOME AND EXPENDITURE
2013 AND 2012
(unaudited statements) $MILLION

INCOME	2013	2012
Contribution (less NHF)	11 483.3	9 239.4
Investment Income	(220.2)	7 705.3
Total	**11 263.1**	**16 944.7**
EXPENDITURE		
NIS Benefits	14 735.9	11 753.5
Administrative Expenses	1 038.7	839.6
Total	**15 774.6**	**12 593.1**
NET INCOME	4 511.5	4 351.6

Source: Ministry of Labour and Social Security

CULTURE

The Ministry of Youth and Culture (MYC) remained committed to further enhancing Brand Jamaica by utilizing the dynamic culture as a platform for development. Over the period, a National Cultural and Creative Industries Commission was established, indicative of the country's national priority and policy focus on the area. The objective of the Commission is to undertake the development and implementation of a policy and master plan. The MYC also revisited the National Cultural Policy, placing emphasis on economic contribution of cultural and the creative industries. This was facilitated through a Cultural Industries Framework aimed at enhancing the economic contribution to the industries. The policy continued to guide the work of the main cultural agencies — the Division of Culture (MYC); the Jamaica Cultural Development Commission; the Institute of Jamaica; and Jamaica National Heritage Trust—through the

11 Special Anniversary clients were born before January 1, 1908, and would not have been able to contribute to the National Insurance Scheme, established in 1966.

implementation of several programmes and initiatives aimed at cultural development.

Jamaica was among 12 new members elected to a 21-member intergovernmental committee in charge of managing UNESCO's World Heritage List and implementing the 1972 World Heritage Convention. The committee reviews the state of conservation of World Heritage sites and inscribes new ones. The World Heritage List now records 981 sites in 160 countries including 759 cultural, 193 natural, and 29 mixed properties.

The Jamaica Cultural Development Commission

The Jamaica Cultural Development Commission (JCDC) continued to create and foster opportunities for the developing and bolstering of Jamaica's creative economy. Over the period, the JCDC celebrated its 50th anniversary under the theme "Celebrating Cultural Excellence", which marked a significant milestone in the Commission's sojourn. The JCDC through its national cultural programmes continued to foster civic pride and cultural awareness, through the developing and showcasing of local talents, the preservation of Jamaica's intangible cultural heritage and building Brand Jamaica. Some of the major activities that were undertaken included: Visual Arts, Literary Arts, Culinary Arts, Performing and Entertainment Arts — all elements of the National Festival of the Arts. The talents were showcased through the following activities:

- Jamaica Creative Writing Competition and Exhibition, formerly the National Visual Arts Competition and Exhibition, which placed great emphasis on promoting Jamaican art to the world and highlighted the inherent value of defining Jamaica's national identity. Through this venture, the Golden Anthology, a compilation of gold medal-winning pieces of Jamaican cultural literature was produced.
- Jamaica Visual Arts Competition and Exhibition, formerly the National Visual Arts Competition and Exhibition, emphasized the promotion of placed great emphasis on promoting Jamaican art to the world and highlighted the inherent value of defining Jamaica's national identity. The revamped exhibition was dubbed Main Audience Day Experience (M.A.D.E) and included the following activities: "Mek It an Share It" (public giving of handmade gifts for youngsters 9–18 years), Schools' Art Day Out and an Art Lunch Hour Concert. The Schools' Art Day Out took the form of an "Artlympics" competition for schools to win an incentive of $100 000.00 for their art department. This inaugural activity was won by Tacuis Golding High School.
- Jamaica Festival Queen Competition continued to provide opportunities for eligible Jamaican women to develop professionally and personally.

Other talents were exhibited through the Jamaica Gospel Song Competition and the World Reggae Dance Championship. As part of efforts to expand the reach of the Dance Championship, the Commission signed a Memorandum of Understanding with the One Love Jamaica Festival Committee in Japan to stage an Elimination Show. This resulted in two entrants from Japan in the national competition. Other international entrants represented Finland and Guadeloupe. In lieu of the Jamaica Festival Song Competition, there was the selection of the top 20 Festival Songs of all time. The JCDC's All Time Best Festival Song was entitled the "Land of My Birth".

As a part of the JCDC's 50th celebration activities, a major focus was to exploit strategies that would increase the Commission's fan base, while building Brand Jamaica. This was possible through Cultural Dialogues, the Festival Song Competition, National Culture Clubs, and through social media that penetrated the world with authentic digital Jamaican cultural content.

In a continued effort to highlight the significance of national icons, a number of major commemorative events were staged, namely: The Right Excellent Alexander Bustamante, Norman Manley and Marcus Garvey Civic and Floral Tribute; the Grand Gala and Festival Village; Miss Lou Celebrations; National Church Services; and Salute to the Heroes during national heritage week under the theme "Our History…Our Strength".

In embracing the drive towards a gender neutral environment for operational and policy development and efficiency, the Commission in September became a gender certified organization having successfully met the necessary requirements by the Bureau of Women's Affairs.

Institute of Jamaica (IOJ)

The IOJ launched a new division — National Museum Jamaica — to promote Jamaica's rich cultural heritage, rebrand the IOJ and assist with obtaining funding. The division managed five historic and ethnographic museums, namely: the People's Museum of Craft and Technology in Spanish Town; the Museum of St. James in Montego Bay; the Hanover Museum in Lucea; and the Fort Charles Museum in Port Royal. The museum is the repository of more than 15 000 historic, ethnographic and archaeological artefacts relevant to Jamaica's history from prehistoric to the present period.

The Junior Centres of the Institute, which held its 3rd Annual Children's Symposium under the theme "Broken Butterflies", facilitated the visual and performing arts as a means of social intervention and exposed the potential of individuals ages 6–18 years. The symposium focused on five topical issues: children's rights and responsibilities; sexual abuse; domestic violence; delinquent behaviour and children in conflict with the law; and internet-based offences against children. Over 200 students participated and benefited from the motivational discussions. The overall objectives of the sessions were to increase children's awareness of the institutional framework that exists to protect their rights and provide a list of safe havens, to encourage them to make responsible life choices and to teach them coping skills.

The 126th anniversary of the birth of the Right Honourable Marcus Mosiah Garvey was commemorated with the staging of the 4th annual Marcus Garvey Lecture, under the theme "Liberate Your Mind from Mental Slavery: The Importance of Archives and Museums within Inner-City Black Communities". An annual educational symposium titled "Sankofa" was also convened under the theme "Self-Identity among People of African Descent in the 21st Century and Revisiting Garvey's African Fundamentalism". Sankofa linked students in Greensboro, North Carolina with over 290 youth in Jamaica via video cast. The symposium targeted students in 5th and 6th form as well as students in Teachers' Colleges. The discussion was facilitated by presentations from scholars, films, and soundtracks. The event was supported by the US Ambassador's Fund, the IOJ, and Friends of Liberty Hall.

In keeping with the IOJ's mandate for the encouragement of literature, science and art in Jamaica, eight distinguished Jamaicans received the Musgrave Award at the Annual Musgrave Medals Award Ceremony. Two gold, four silver and two bronze medals were presented to the awardees for their achievements in the literary, scientific and artistic fields. The medals were presented to musicians/composers, authors/painters and poets/writers.

In an effort to showcase the diversity of the Jamaican music, a live session was held which featured musical icons from the 1960s to present. Four major lectures as well as three panel discussions were held as part of the Jamaica Music Museum series under the theme, "Jamaica and the Global Perspective: Music, Culture and Badness".

A number of exhibitions were also mounted during the period by the National Museum Jamaica and the Jamaica Music Museum to showcase Jamaica's music, art and heritage. These included: Jamaica's World Wetlands Day Exposition, Jamaica's Premier National Art Exhibition, the public launch of a Rastafari Exhibition, an exhibition featuring the instruments used in the folk music forms documented by the Dr Hon. Olive Lewin and New Roots Art Exhibition (conventional and new media art on various surfaces, genre and styles). A temporary exhibition was also mounted in the Departure Lounge of the Norman Manley International Airport. It provided departing visitors and locals with a snapshot of post-independence Jamaican musical genres. Funding for these exhibitions was provided by the Tourism Enhancement Fund (TEF), CHASE Fund, and Embassy of the United States Kingston, Jamaica, among others.

Persons from Jamaica (24 946), the United States of America (11 935) and United Kingdom (2 644) were the most frequent visitors to the IOJ Web Portal over the period.

Jamaica National Heritage Trust (JNHT)

The Jamaica National Heritage Trust (JNHT) remained focused in undertaking its primary functions of promoting, preserving and developing Jamaica's material culture heritage. During the year, JNHT conducted a three-day Archaeological Impact Assessment (AIA) in Halberstadt, St. Thomas, on 166 acres of land proposed for the reopening of a Caribbean Cement Gypsum Quarry. The objectives of the assessment were to ascertain, among other things, the presence of historical and archaeological resources and their status, socio-economic attributes, short- and long-term impact and possible alternatives as well as to provide recommendations.

An AIA was also conducted on Phase 2 of the North-South Link of Highway 2000 (Ferry to Linstead, St. Catherine) in the area of Crescent District in St. Catherine (Dam Head Rio Cobre), where construction of the highway had commenced. During the assessment, two caves were observed in alignment with the highway, where a small population of bats was identified. Contact was made with NEPA for the necessary actions to be taken. Among other things, an assortment of artefacts was also observed and samples recovered.

Construction of a new army barrack at Up Park Camp at the Lathbury Barracks site was halted to facilitate an archaeological rescue mission. Over 1 000 pieces of artefacts were recovered; including whole artefacts, glass objects, metal, ceramics, stones and bones. They were taken to the JNHT Finds Lab for sterilization and inventory.

Culture, Health, Arts, Sports and Education (CHASE) Fund

In addition to government budgetary allocation to the ministries, departments and agencies with responsibility for culture, the Culture, Health, Arts, Sports and Education (CHASE) Fund also provided additional funding to cultural initiatives and projects, as per its mandate, since its establishment in 2003. Over the period February 2013 to January 2014, some 84 projects totalling $194.7 million in grants were approved. This demonstrated an increase of 12.1 per cent relative to the $173.7 million approved for the previous period. The performing arts; literary works; heritage and craft; music; film and media accounted for 83.3 per cent of projects approved in the current period, valued at approximately $113.0 million.

OUTLOOK

In February 2014 new loan financing for the National Strategic Plan for Early Childhood Development was approved by the World Bank. These funds will continue to support the work of the Early Childhood Commission in standardizing, regulating and monitoring early childhood institutions and the sector. The National Parenting Support Commission will intensify its programming to include national communication and outreach activities, including a campaign dubbed "Effective Parenting". The campaign will encompass several activities such as public service announcements, the launch of parenting ambassadors, parenting education sessions, and community fora.

For FY 2014/15, the Office of the Children's Registry (OCR) intends to strengthen the effectiveness of the registration system through the continued expansion of its offices to Westmoreland and St. Mary. The Registry will also focus on the improvement of its case management and Ananda Alert systems. In addition, the OCR will seek to expand its Child Ambassadors Programme and its public education drive.

With regards to Child and Adolescent Mental Health Services (CAMHS), a major thrust in 2014 will be the development of concrete plans to establish an adolescent psychiatric in-patient Unit located within the government services. Additional plans include oversight responsibilities concerning the Mobile Mental Health Unit for children in State Care Institutions, development of milieu therapy at the South Camp Juvenile Remand and Correctional Centre, and continued advocacy efforts to improve staffing and infrastructure in the Child Guidance Clinics islandwide.

The Child Development Agency (CDA) with funding support from UNICEF will be strengthening its capacity to support the expansion of the Multi-Agency Strategic Development for Child Protection Project in both the Southern (Clarendon, Manchester, and St. Elizabeth) and Western (Trelawny, St. James, Westmoreland and Hanover) regions. The Agency will also focus on continuing the expansion of Child Protection Committees islandwide, and completing the review of relevant legislation and research initiated in 2013, inter alia.

The Office of the Children's Advocate (OCA) will embark on training sessions with various stakeholders who treat children who come in contact with the justice system, based on the Child Justice Guidelines. The Child Justice Guidelines establishes a set of protocols for addressing the needs of these children (including child victims, witnesses, and children in conflict with the law).

The Ministry of Youth and Culture (MYC) expects to finalize the revision of the National Youth Policy and Implementation of Action Plan for Youth Development and construction work on four Youth Information Centres (YICs) and National Youth Service (NYS) offices will be carried out. In addition, there are plans to establish Monitoring and Evaluation Systems in YICs and the NYS.

The School to Work Transition Survey conducted by STATIN on behalf of the ILO and the MLSS was completed in 2013 and the MLSS is expected to carry out dissemination activities in early 2014 to apprise the public of the findings of the survey. These findings are expected to inform and guide youth policy and programme development.

The identification cards system for senior citizens was extended in early 2014 to include all parishes. The ID cards will also allow senior citizens to access other benefits such as discounts on some items at pharmacies and supermarkets.

It is anticipated that efforts will continue to be placed on the implementation of the National Policy for Gender Equality, and that the gender mainstreaming process will be advanced in all government policies, programmes, plans and projects through the established gender focal points. Additionally, the Bureau of Women's Affairs (BWA) in collaboration with local and regional statistical agencies will focus efforts on creating a database to house critical gender indicators that will be used to inform policy decisions.

New financing of the Social Protection Project, which will facilitate completion of certain key activities and provide for the extension of the project for another four years (2014–2018), was approved by the World Bank in January 2014. This will enable further technical studies, exploration of best practice models in social protection, and capacity-building of key stakeholder institutions. The project will also continue to support the financing of cash grants under the Programme of Advancement Through Health and Education (PATH).

In further development of the Steps-to-Work programme, under a new Memorandum of Understanding, plans have been initiated to implement post-business start-up training of up to 600 clients in 2014. The Jamaica Business Development Corporation (JBDC) has also been contracted to provide quarterly training workshops for MLSS Enterprise Development Field Officers, to strengthen the MLSS capacity to provide technical support for clients engaged in Micro Enterprises. The post-start-up workshops will provide vital exposure for entrepreneurs in expanding their businesses, including providing and obtaining credit, saving and budgeting. The JBDC will also provide consultation and field monitoring services to clients on a limited basis, and provide technical advice for the MLSS Entrepreneurship Grants Initiative. Under the terms of the agreement, 130 Micro Enterprise Pig Farms will be established by the end of 2014, and offspring harvested from these farms will be used to generate stock for additional farms.■

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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 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.

Biodiversity

The variety of life forms from genes to species and their respective ecosystems.

Broad money

Narrow money plus quasi money.

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.

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 every thing 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)

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 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.

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.

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 Polices

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.

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.

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.

Gross National Product GNP

Total GDP plus net income transfers from abroad.

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.

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.

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

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.

PDA Institutions

Protection of Depositors Act Institutions are financial intermediaries, which are near banks. Unlike commercial banks these institutions cannot offer current account services.

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.

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.

Stock Exchange

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.

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.

Tsunami

A large ocean wave which is produced by an underwater earthquake or volcanic eruption.

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.

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