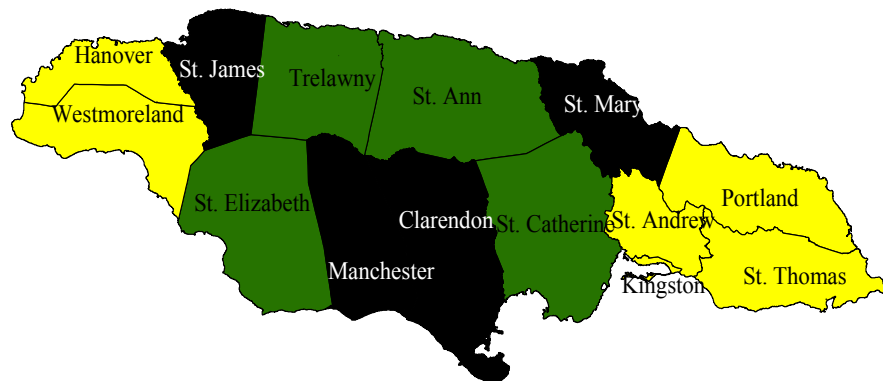


ECONOMIC AND SOCIAL SURVEY JAMAICA 2014



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16 Oxford Road
Kingston 5
Jamaica W.I.

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

The focus of the government's Economic Reform Programme (ERP) in 2014 was on generating economic growth and creating jobs, while maintaining fiscal prudence. The ERP achieved measured success as the Jamaican economy showed growth in real Gross Domestic Product and employment. The economy grew by 0.4 per cent and employment by 1.7 per cent. In addition, the inflation out-turn for the year at 6.4 per cent was the lowest for a calendar year since 2011. While the country was spared from hurricanes during the year, the protracted drought and to a lesser degree industrial plant downtime hindered stronger economic growth. The Government successfully completed four quarterly reviews by the International Monetary Fund (IMF) during the calendar year, which released Special Drawing Rights of 183.8 million (approximately US\$277.9 million) as well as capital flows from the country's multilateral and bilateral partners. Improving the business environment for private sector investment was another area of focus reflected in agreements with the International Monetary Fund and other external financial support institutions and entities

Jamaica's progress towards sustainable development was demonstrated in the improvement of key economic and social indicators including inflation, unemployment and crime, as well as stability in some environmental indicators such as forest cover, beach width and coral health. The country remained in the high human development category of the Human Development Index (HDI). Work continued to improve the policy and regulatory framework in the areas of environmental management, development planning, and science, technology and innovation. There was a full roll-out of the Application Management and Data Automation

(AMANDA) System in Local Authorities and agencies having responsibility for aspects of the development approvals process. Climate modelling, preparation of "near-term climate scenarios" (up to 2040) and public education underpinned efforts towards building a climate-resilient economy.

The Social Protection Strategy, the first of its kind in the Caribbean, was launched in 2014 as part of Government's efforts to ensure a comprehensive and cohesive programme of social protection. The work of the Community Renewal Programme continued in 17 inner-city communities in Downtown Kingston and along the Three Miles Belt of Kingston. The implementation of *Vision 2030 Jamaica – National Development Plan* continued, and the *Medium Term Socio-economic Policy Framework Progress Report 2009–2012* prepared. The Report also reviewed the progress made towards establishing the framework for implementation, monitoring and evaluation of the Plan, as well as in communicating the Plan to all stakeholders.

The Institute would like to take this opportunity to advise our readers that starting in 2016, with the assistance and cooperation of our data providers we expect to produce the *Economic and Social Survey Jamaica* earlier than is customary. This is in keeping with the new budget calendar for the preparation and approval of the annual budget as outlined in the new fiscal rules.



Colin Bullock
Director General
Planning Institute of Jamaica

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The Planning Institute of Jamaica (PIOJ) would like to thank all the persons involved in the various stages of production of the *Economic and Social Survey Jamaica (ESSJ) 2014*. We would like to recognize firstly our main data suppliers, the Statistical Institute of Jamaica, the Bank of Jamaica, and the Ministry of Finance and Planning. We also extend our appreciation to the various Ministries, Departments and Agencies, Commodity Boards, statutory organizations, educational institutions, and private sector agencies for their cooperation in imparting information on their respective sectors and industries.

Kudos to the Jamaica Printing Services who have worked around the clock for over 20 years to print this document. And

to our readers, who include researchers, academics, students, librarians and the business sector, we thank you for your loyalty and support over the many years.

A special thank you also to the staff of PIOJ involved in the process, including chapter writers, editors, the Wesley Hughes Documentation Centre's staff, the administrative personnel, the transportation and production teams.

Finally, the Institute would like to commend all of our data providers for responding so readily to our request for a more expeditious supply of data to facilitate the early presentation of the Budget this year.

SELECTED INDICATORS
2010–2014

	Unit	2010	2011	2012	2013	2014
GDP at Current Market Prices	\$b	1 154.0 ^F	1 241.1 ^T	1 315.8 ^F	1 430.5 ^T	1 529.4 ^P
GDP at Constant (2007) Market Prices	\$b	827.6 ^F	841.7 ^T	836.9 ^F	841.6 ^T	n/a
Total Gross Value Added in Basic Values at Constant Prices		724.1	734.2	730.8	732.2	735.3
Growth in GDP at Constant (2007) Market Prices	%	-1.5 ^F	1.7 ^T	-0.6 ^F	0.6 ^T	0.4 ^g
Goods Production as % of Total Real GDP	%	24.0	24.9	24.5 ^F	24.6	24.5 ^P
Agriculture	%	6.6 ^F	6.6	6.8	6.7	6.6
Mining & Quarrying	%	2.1	2.4	2.2	2.3 ^P	2.3
Manufacture	%	8.5	8.6	8.5 ^F	8.4 ^P	8.3
Construction	%	7.4 ^F	7.3 ^T	7.0 ^F	7.1 ^P	7.2
Services	%	80.4 ^F	79.3	79.5	79.4	79.6
Basic Services	%	14.6	14.3 ^T	14.2	14.2	14.2
Electricity & Water	%	3.3	3.3	3.2	3.2	3.1
Transport, Storage & Communication	%	11.3	11.0	11.0	11.0	11.1
Total Other Services	%	65.8 ^F	65.0 ^T	65.3	65.3	65.3
Financial Intermediation Services Indirectly Measured	%	4.4	4.2	4.1	4.0	4.0
Exports as % GDP (current)	%	10.1	11.3	11.7	11.1	10.6
Imports	%	40.3	44.7	42.8	43.2	42.5
GDP per capita						
Current	\$'000	428.9	459.7	485.9	526.9	562.2
Constant	\$'000	269.1	272.0	269.9	269.7	270.3
Consumer Price Index (CPI)(end Dec.)		168.1	178.2	192.5	210.7	224.1
Inflation : Dec./Dec.	%	11.7	6.0	8.0	9.5	6.4
: Annual Avg		12.6	7.5	6.9	9.4	8.3
Implicit GDP Deflator, 2007 = 1.00 ^a		1.4	1.5	1.5	1.7	1.8
Changes in Implicit Deflator	%	8.3	6.3	5.9	7.5	6.2
Avg. Wtd. Comm. Bank Loan Rate	%	20.40	18.03	18.44	17.72	17.22
Avg. Wtd. Comm. Bank Deposit Rate	%	2.95	2.44	2.10	1.85	2.21
Ja. Stock Exchange Index (end Dec.)	Points	85 220.8	95 297.2	92 101.2	80 633.5	76 353.4
Stock Market Capitalisation	\$b	564.7	619.4	590.6	492.2	296.8
M1	\$b	112.2	120.6	133.3	148.7	165.0
% Change	%	4.1	7.4	10.5	11.6	10.9
M2	\$b	337.7	351.4	374.5	416.0	446.5
% Change	%	1.7	4.1	6.6	11.1	7.4
Total Revenue ^b	\$b	314.6	322.5	344.7	397	351.4
Recurrent Revenue	\$b	310.9	311.9	339.7	396.3	350.0
Total Expenditure	\$b	388.8	403.2	399.3	395.2	390.6
Recurrent Expenditure	\$b	333.2	350.0	361.5	358.3	367.9
Capital Expenditure	\$b	55.6	53.2	37.8	37	22.7
Debt Servicing	\$b	230.5	249.1	208.3	216.5	201.4
Surplus/Deficit	\$b	-74.2	-80.7	-54.6	1.7	-39.2
Total Revenue as a % of GDP	%	26.4	25.5	26.3	27.8	n/a
Recurrent Revenue	"	26.1	24.7	25.9	27.7	n/a
Recurrent Expenditure	"	27.9	27.7	27.5	25.0	n/a
Total Expenditure	"					
(excluding Amortisation)	"	32.6	31.9	30.4	27.6	n/a
Surplus/Deficit	"	-6.2	-6.4	-4.2	0.1	n/a
Debt Servicing	"	19.3	19.7	15.9	15.1	n/a
EXTERNAL TRADE						
Total Imports (c.i.f.)	US\$ m	5 326.4	6 439.4 ^F	6 331.1 ^T	6 129.9	5 838.2
Annual Growth In Total Imports	%	5.2	24.2	-1.7	-3.2	-4.8
Consumer Goods (excl. Motor Cars)	US\$ m	1 702.0	1 682.6 ^T	1 615.1 ^F	1 590.9	1 667.1
Raw Material/Intermediate Goods	US\$ m	3 088.6	4 118.3 ^T	4 000.8 ^F	3 820.5	3 429.0
Capital goods (excl. Motor Cars)	US\$ m	429.2	494.3 ^T	494.2 ^F	504.1	568.7
Passenger Motor Cars	US\$ m	106.6	144.1 ^T	221.0 ^F	214.4	173.4
Total Exports (f.o.b.)	US\$ m	1 335.7	1 622.4 ^F	1 728.4 ^T	1 580.4	1 452.0

II

	Unit	2010	2011	2012	2013	2014
Annual Growth In Total Exports	%	1.2	21.6	5.4	-8.6	-8.1
Traditional Exports	US\$ m	654.3	860.5 ^T	814.0 ^T	779.6	782.3
Bauxite	US\$ m	128.7	141.9	130.1	128.0	131.2
Alumina	US\$ m	402.8	580.7	508.3	523.7	529.4
Sugar	US\$ m	44.2	62.2	94.1	53.2	55.8
Banana	US\$ m	0.001	0.063	0.1	0.1	0.2
Non-Traditional Exports	US\$ m	599.1	674.7	846.7 ^T	719.6	606.1
Wearing Apparel	US\$ m	1.6	1.5	1.4	1.4	1.4
Trade Balance	US\$ m	-3 990.7	-4 817.0	-4 602.7 ^T	-4 549.5	-4 386.2
BALANCE OF PAYMENTS						
Current Account Balance	US\$ m	-934.0	-2 116.5 ^T	-1 823.1 ^T	-1 319.6	-1 159.7
Goods Balance	US\$ m	-3 259.0	-4 257.6 ^T	-4 158.0	-3 881.5	-3 730.5
Total Imports	US\$ m	4 627.4	5 922.4 ^T	5 904.7	5 462.0	5 183.6
Total Exports	US\$ m	1 368.0	1 664.8 ^T	1 746.7	1 580.5	1 453.0
Services (Net)	US\$ m	810.0	669.8 ^T	588.8 ^T	618.3	665.4
Balance on Goods and Services	US\$ m	-2 449.0	-3 587.8 ^T	-3 569.5 ^T	-3 263.2	-3 065.1
Income (Net)	US\$ m	-494.6	-518.4 ^T	-301.4 ^T	-276.9	-386.3
Current Transfers (Net)	US\$ m	2 010.0	1 989.8 ^T	2 047.8 ^T	2 220.5	2 291.8
Capital & Financial Account Balance	US\$ m	934.0	2 116.5 ^T	-918.6 ^T	-1 201.8	-1 159.7
Reserves (Minus=Increase)	US\$ m	-442.0	205.2	-840.2 ^T	-163.6	-656.3
Private Remittance Inflows	US\$ m	1 906.2	2 018.4 ^T	2 042.5 ^T	2 065.0	2 159.6
Net International Reserves	US\$ m	2 171.41	1 967.01 ^T	1 125.58	1 047.83	2 001.97
Net Foreign Assets	\$b	239.8	229.2	192.3 ^T	219.2 ^T	380
Nominal Exchange Rate (\$ per US\$1.00) Average Annual	\$	87.38	86.08 ^T	88.99	100.77	111.22
Total Visitor Arrivals	Million	2.8	3.1	3.3	3.3	3.5
Stopover	Million	1.9	2.0	2.0	2	2.1
Cruise Passengers	Million	0.9	1.1	1.3	1.3	1.4
Occupancy Rates	%	60.5	60.5	62.3	67.9	n/a
Foreign Exchange Earnings	US\$Million	2 001.2	2 008.4	2 069.6	2 112.6 ^T	2 235.7
Energy						
Petroleum Imports ^c	mb	18.6	19.5	18.7 ^T	19.7	18.8
Electricity Generated	GWh	4 137.4	4 137.0	4 136.0	4 146.0	4 107.5
Population						
'000 persons		2 695.5	2 704.1	2 711.5	2 717.9	2 723.0
Growth Rate	%	0.3	0.3	0.3	0.2	0.2
Crude Birth Rate	per 1 000 pop.	15.1	14.7	14.6 ^T	14.2 ^T	13.9
Crude Death Rate	per 1 000 pop.	8.0	6.3	6.3	6.4 ^T	6.5
Natural Increase	%	7.1	8.4	8.3 ^T	7.8	7.4
Total Fertility Rate	%	2.4	2.4	2.4	2.4	2.4
Net External Movement	'000 persons	-9.7	-14.5	-15.0	-14.7	-14.9
Labour Force						
'000		1 249.7	1 251.3 ^T	1 281.9 ^T	1 308.5 ^T	1 307.7 ^P
Male	'000	685.8	685.3 ^T	702.9 ^T	713.5	715.2 ^P
Female	'000	563.9	566	578.9 ^T	595.1	592.6 ^P
Labour Force Participation Rate	%	62.4	62.3	61.9 ^T	63.0	63.0
Male	%	70.4	70.2	69.0 ^T	70.0	70.0
Female	%	54.8	54.9	55.0 ^T	56.3	55.9
Total Employment	'000	1 094.9	1 093.0 ^T	1 103.4 ^T	1 109.1	1 128.1 ^P
Male	'000	622.6	621.6 ^T	629.1 ^T	633.4	643.0 ^P
Female	'000	472.3	471.4 ^T	474.2 ^T	475.6	485.1 ^P
Total Unemployment Rate	%	12.4	12.6	13.9 ^T	15.2	13.7
Male	%	9.2	9.3	11.0 ^T	11.0	10.1
Female	%	16.2	16.7	18.0 ^T	20.0	18.1
Average Weekly Earnings of All Employees(1990 \$) ^d	\$	15 823 ^T	17 532	18 113	20 398	n/a
Education						
Enrolment in :	('000)					
Primary Institutions	"	294.7	289.6	283.6	269.5	257.5
Secondary Institutions	"	265.1	260.4	251.7	239.9	236.1
Tertiary Institutions	'	32.8	27.5	35.4	34.4	33.0
University	"	36.2	41.5	39.2	40.1	41.6
Literacy Rate ^e	%	91.7	91.7	91.7	91.7	91.7

	Unit	2010	2011	2012	2013	2014
Training						
Total output of Technical, Managerial & Related Manpower	('000)	13.2	15	15.5	15.1	15.8
Total output of Skilled and Semi-skilled Manpower	"	48.1	48.6	50.3	65.6	62.5
Health						
Infant Mortality Rate	per '000 live births	16.7	16.7	16.7	16.7	16.7
Percentage Beds Occupancy	%	61	61.9	67.8 ^f	72.8	73.9
Immunization (National Average):	%					
- DPT, OPV, BCG (0–11 months)	%	100.5 ^f	93.9	89.7 ^f	90.6	91.1
- MMR (12–23 months)	%	95.0 ^f	86.5 ^f	80.0 ^f	94.0 ^f	92
Access to Safe Water	%	77.4	n/a	n/a	n/a	n/a
Sanitary Facility	%	99.5	n/a	n/a	n/a	n/a
Life Expectancy (at birth)	yrs	72.7	72.7	72.7	73.1	74.1
Maternal Mortality	per 100 000	94.8	94.4	94.4	94.4	94.4
National Security						
Overall Crime Rate	per 100 000	n/a	n/a	n/a	n/a	n/a
Category 1 Crime Rate ^h	"	409	403	396	351	314
Murder Rate	"	53	42	40	44	37
Environmental						
Annual rate of change, Broadleaf Forest	%	-0.2 ^p	-0.2 ^p	-0.2 ^p	-0.2 ^p	-0.2 ^p
Annual rate of change, Open Dry Forest	%	-7.2 ^p	-7.2 ^p	-7.2 ^p	-7.2 ^p	-7.2 ^p
Energy Consumption per capita	(BOE)	7.5	7.7	7.5 ^f	7.0 ^f	7.0 ^p
Alternative Energy ('000)	(BOE)	816 ^f	1 057 ^f	1 014 ^f	1 182 ^f	1 216 ^p
Per capita domestic water consumption	Megalitres	0.036	0.038 ^p	0.035 ^p	0.034	0.030 ^p
Annual Rainfall (mm)	mm	2 272	1 747	1 567	1 470	1 506
Avg. Annual Temperature ^f	Celsius	27.9	27.9	28.0	28.2	28.3
% population in urban areas		52.0	52.0	54.0	54	54.0
Per Capita Waste generation	(kg/day)	n/a	n/a	n/a	1.1 ^f	1.0
Science, Technology & Innovation						
Fixed Telephone Penetration	%	10.5	10.0 ^f	9.3	9.2 ^f	9.3 ^p
Mobile Penetration	%	117.6 ^f	108.9 ^f	100.1 ^f	104.7 ^f	105.8 ^p
Broadband Penetration (fixed line)	%	4.2	4.3	4.4	4.9	5.6 ^p
Broadband Penetration (mobile subscriptions)	%	n/a	n/a	n/a	28.9	34.1 ^p
EIU Digital economy ranking		44 of 70	n/a	n/a	n/a	n/a
Networked Readiness Index		66	73	74	85	86
ICT Development Index		84	93	98	97	n/a
Resident patent filings		13	20	25	22	33

Notes :

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

b - Revenue and Expenditure Figures are for 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 2010–2014 is based on the Literacy Module of the *Jamaica Survey of Living Conditions (2008)*

f - Average of temperatures for two main international airports

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

mb - million barrels

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

p - provisional

n/a - not available

r - revised

BOE - Barrel of Oil Equivalent

OVERVIEW



An aerial view of the Portmore toll road.

Photograph contributed by the IDB

OVERVIEW 2014

INTRODUCTION

The Jamaican economy and society continued to make advances, as during 2014 improvements were recorded for the key developmental indicators used to assess progress towards achieving the goals of *Vision 2030 Jamaica – National Development Plan*. These were achieved against the background of a very challenging economic environment characterised by a tight fiscal stance as the Government of Jamaica (GoJ) continued to successfully implement key reforms to reduce the high burden of debt and lay the foundations for sustained economic growth and development. During 2014, the country successfully completed four quarterly reviews¹ under the 48-months Extended Fund Facility Agreement (EFF) with the International Monetary Fund (IMF), meeting all quantitative and benchmark targets established. This resulted in total disbursements of US\$277.9 million during the year, bringing the total disbursements since the start of the Agreement to US\$546.39 million.

During the year, several reforms and initiatives aimed at improving the business environment and increasing competitiveness were implemented. These included:

- the establishment of a Secured Transactions Framework and Central Collateral Registry
- the streamlining of the business registration process with the implementation of a single Business Registration Superform and the establishment of an electronic interface linking the relevant public agencies
- the passage of a new Insolvency Act to simplify the process of declaring bankruptcy
- the passage of legislation for Flexible Work Arrangements
- approval of reforms to the Development Applications Process
- the development of a framework for the establishment of Venture Capital funds
- increasing the levels of financing available to Micro Small and Medium-sized Enterprises.

The impact of these and other previously implemented reforms on the Business Environment were evidenced by the improvements recorded in the global surveys of

competitiveness and business environment rankings. The Doing Business Report 2015 indicated that Jamaica moved up 27 places in the ranking to 58, while the World Economic Forum's Global Competitiveness Report for 2014–15, ranked Jamaica at 86 out of 144 countries, up from 94 of 148 countries in the 2013–14 Report.

Real value added growth of 0.4 per cent was recorded for 2014. Growth of 1.7 per cent was recorded for the first half of the year, however, for the second half of the year the economy contracted by 0.9 per cent. This significant curtailment of economic activities in the latter half of the year was due largely to:

- the adverse impact of severe drought conditions which prevailed during June and July on agriculture and water production
- the impact on output of longer than scheduled plant closures in the major industrial sectors.

Prices remained relatively subdued with an inflation rate out-turn of 6.4 per cent, falling below the projected range of 7.0 per cent – 9.0 per cent. Export price competitiveness continued to improve in 2014 as there was a real depreciation of 1.6 per cent in the Jamaican dollar relative to the US dollar. The merchandise trade deficit improved by US\$163.3 million, due to a 4.8 per cent decline in imports which offset an 8.1 per cent reduction in exports. Consistent with the expansion in economic activities, the average level of employment increased by 19 125 persons, resulting in a 1.5 percentage point lowering in the average unemployment rate to 13.7 per cent. However, the percentage of persons in the labour force without training was 70.2 per cent while a total of 773 950 persons remained outside the labour force.

Work to advance the country's efforts to achieve the goals of *Vision 2030 Jamaica – National Development Plan*, in its 6th year of implementation, focused on building a long-term sustainable framework for the implementation, monitoring, evaluation and communication of the Plan. This included ensuring the alignment of the three-year strategic Business Plans of Ministries, Department and Agencies (MDAs) with the goals of Vision 2030 and the Medium Term Socio-economic Policy Framework 2012–2015. A three-year progress report on *Vision 2030 Jamaica* for the period 2009/10–2011/12 was prepared and reviewed by stakeholders and a draft two-year progress report for 2012/13 – 2013/14

1. Quarterly reviews were undertaken for October to December 2013, January to March 2014, April to June 2014, and July to September 2014.

was also prepared. Quarterly reports on the status of implementation and achievements of targets as outlined in the MTF 2012–2015 were also completed during the year.

New and ongoing **Official Development Assistance (ODA)** played a pivotal role in supporting the achievement of goals and objectives outlined in the MTF 2012–2015. During the year, ODA in the form of loans, grants and technical assistance amounted to \$289.6 billion, and targeted strategic development priorities in the areas of macro-economic and social stability, economic growth, security, education and training, and climate change resilience.

Major activities aimed at facilitating **Sustainable Development** included: improvements in the policy and regulatory framework; the development and dissemination of materials to promote climate change awareness; and climate modelling and preparation of “near-term climate scenarios” to aid decision making in a climate-sensitive economy.

Science, Technology and Innovation sector continued to promote the use of STI in productive industries, as a driver for improved productivity, efficiency and economic growth. During the year, programmes were implemented to enhance the development of sustainable agricultural production systems as a means of ensuring food security.

At the end of 2014, the Jamaican **population** was estimated at 2 723 200, representing a growth rate of 0.2 per cent. This reflected the impact of estimated births and deaths at 37 900 and 17 600, respectively, and net external movements at 14 900.

Advancement in the area of **Education and Training** with respect to achieving the goals of *Vision 2030 Jamaica* was evident in improved students’ performances in national and regional examinations. Access to education also increased with the creation of 6 960 school spaces. An estimated 71.3 per cent of the school-age cohort was enrolled during the academic year.

The focus of the **Health** sector during the year included: primary health care renewal; reduction in maternal and child mortality; the development of the National HIV Policy; the adoption of the Infant and Young Child Feeding Policy; and implementation of mortuary guidelines for the reduction of communicable disease. The demand for services in the public sector health institutions increased, reflecting higher levels of admissions and the length of stay in hospitals.

Against the background of increasing vulnerabilities as a result of a challenging economic environment, **Social Development** continued to be a high priority of the government. A comprehensive Social Protection Strategy aimed at achieving the National Outcome of ‘Effective Social Protection’ was launched.

Improvements continued to be recorded in the area of **National Security**, with continued reduction in the number of reported Category 1 crimes. The number of murders reported

was the lowest since 2003. Strategic developments during the year included the merger of the Island Special Constabulary Force (ISCF) into the Jamaica Constabulary Force (JCF). There was also the merger of the Major Organized Crime Task Force and the JCF’s Anti-Corruption Branch to form the Major Organized Crime and Anti-Corruption Agency tasked with reducing the incidence of corruption. Additionally, priority attention was given to the dismantling of gangs through the establishment of a National Strategic Anti-Gang Unit in the Organized Crime Investigation Division of the JCF.

VISION 2030 JAMAICA – NATIONAL DEVELOPMENT PLAN

During 2014, 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) 2012–2015* 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*”.

Over the period, several results were achieved including the institutionalization of *Vision 2030 Jamaica* in MDAs through the infusion of national and sectoral strategies into the corporate and operational plans of MDAs, and alignment to the National Budget. As the National Secretariat for *Vision 2030 Jamaica*, the PIOJ continued to engage with MDAs to facilitate the alignment of key national policies and strategies with *Vision 2030 Jamaica*, including the National Water Sector Policy (draft), the National Climate Change Policy and Action Plan (draft) and the Growth Agenda.

In addition, work continued on the alignment of the MDAs with the new Strategic Business Plan templates by MDAs in FY 2014/2015 with the goals and outcomes of *Vision 2030 Jamaica* and the MTF 2012–2015. This included the alignment of the three 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 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.

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; the EFF Arrangement with the IMF; and with the work of the Growth Agenda Subcommittee of Cabinet established in May 2014. *Vision 2030 Jamaica* and the MTF 2012–2015 were utilized as the guiding framework for Jamaica’s participation in the consultations on, and agenda setting for the Post-2015 Development Agenda process.

A Three-Year Progress Report on *Vision 2030 Jamaica* for FY 2009/2010–FY 2011/2012 was completed during the year and reviewed by stakeholders across MDAs. A draft Two-Year Progress Report on the Medium Term Socio-Economic Policy Framework (MTF) 2012–2015 for the period FY 2012/13 – 2013/14 was also prepared. As an integral part of the PIOJ's Quarterly Press Briefings, 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 46 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. During 2014, the *Vision 2030 Jamaica* National Secretariat in collaboration with the JAMSTATS Unit and UNICEF Jamaica commenced the upgrading and updating of the online interactive graphical E-Dashboard which was launched in 2013 to facilitate monitoring of progress in implementing *Vision 2030 Jamaica*.

INTERNATIONAL ECONOMY

Global economic output was estimated to have increased by 3.3 per cent, reflecting higher output from both Advanced and Emerging Market & Developing Economies. Growth resulted from increased levels of consumer spending and business investment, spurred by: accommodative monetary policies; a moderation in fiscal consolidation; and higher levels of employment in some economies. Consistent with growth of the world economy, global trade of goods and services increased.

Despite improvements, the performance of the global economy was weaker than forecast, reflecting the lower than expected performance of the Euro Area, Japan, as well as sections of Eastern Europe, due to several challenges. Despite strong growth, China's rate of growth slowed as a result of deliberate efforts to restructure the economy. Against this background of weakened prospects, which constrained demand and confidence and foreign direct investment flows, the IMF, on several occasions, revised downwards its projection² for global growth for calendar year 2014.

Commodity prices declined relative to 2013, evidenced by decreases in the World Bank's Energy and Non-Energy Commodity Price Indices. The downward trajectory in crude

oil prices, which started in July 2014, stemmed primarily from supply-side factors including increased production from non-Organization of Petroleum Exporting Countries (OPEC) producing countries and OPEC's decision to maintain output levels despite the fall in prices. On the demand side, weakened global prospects adversely impacted demand. There was also a fall-off in the prices for fertilizers and some agricultural commodities, due to a slowing in demand, fall-off in input prices, and improved supply conditions. As a consequence, there was a moderation in global inflation.

OFFICIAL DEVELOPMENT ASSISTANCE (ODA)

Official Development Assistance (ODA)³ continued to support the strategic priorities outlined in the MTF⁴ 2012–2015. This support took the form of loans, grants and technical assistance totalling US\$2.6 billion⁵ (\$289.2 billion⁶) from International Development Partners (IDPs). Focal areas which received assistance during the period included, inter alia, macro-economic and social stability, growth, citizen security and justice, education and training, and climate change resilience.

Newly approved ODA to Jamaica totalled US\$515.8 million (\$57.4 billion), a decline of 14.4 per cent relative to 2013. Multilateral Financial Institutions (MFIs) were the major sources of new loan and grant financing totalling US\$394.0 million (\$43.8 billion) and US\$78.3 million (\$8.7 billion), respectively. The level of new loan resources from MFIs increased by 140.2 per cent to US\$394.0 million (\$43.8 billion) compared with US\$164.0 million (\$18.2 billion) in 2013. Of the total new loan resources from MFIs, US\$165.0 million (\$18.4 billion) was committed in the form of budget support⁷, reflecting Jamaica's good performance under the agreement with the IMF. This success allowed Jamaica access to additional budget support from the MFIs.

New grant resources from IDPs amounted to US\$111.8 million (\$12.4 billion) of total new ODA, an overall decrease of 12.5 per cent compared with the previous year. This decline was mainly as a result of the 75.5 per cent reduction in grant resources from bilateral partners, which totalled US\$14.0 million (\$1.6 billion). The Multilateral Technical Cooperation (MTC) agencies provided grants and technical assistance amounting to US\$7.7 million (\$856.4 million) while new loan and grant resources from Environment and Climate Change Funds totalled US\$21.8 million (\$2.4 billion).

2. The IMF in January 2014 initially projected global output to increase by 3.7 per cent. This was subsequently revised downwards to 3.6 per cent in April, 3.4 per cent in July and then to 3.3 per cent in October 2014.
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. The MTF articulates the priority outcomes of the *Vision 2030 Jamaica – National Development Plan* for the period.
5. Amounts include GoJ counterpart and are rounded to one decimal point.
6. The average annual exchange rate of US\$1 = J\$111.22 is used.
7. Macroeconomic stability is a condition for budget support.

The allocation of new ODA continued to reflect an emphasis on the Administrative⁸ sector which accounted for US\$258.3 million (\$28.7 billion) of total new ODA. These funds were mainly aimed at budget support programmes. The allocation to the Social Infrastructure⁹ sector was US\$182.2 million (\$20.3 billion). Allocations to the Directly Productive¹⁰, Economic Infrastructure¹¹ and Environment and Climate Change¹² sectors were: US\$50.3 million (\$5.6 billion), US\$2.6 million (\$289.2 million) and US\$22.3 million (\$2.5 billion), respectively.

Net flows¹³ with Jamaica's three main multilateral lending partners, namely: IDB, CDB and World Bank; as well as the People's Republic of China totalled US\$108.0 million (\$12.0 billion) compared with US\$143.8 million (\$16.0 billion) in 2013 (Table 2.3). Total repayment of principal, interest and other charges decreased by 15.0 per cent to US\$188.7 million (\$21.0 billion), while disbursements to on-going projects and programmes totalled US\$298.6 million (\$33.2 billion), a decrease of 18.4 per cent compared with 2013.

Three new Country Strategies (CSs) were signed with the Caribbean Development Bank (CDB), European Union (EU) and the World Bank. The funding commitments under these strategies were as follows: CDB, US\$33.8 million (\$3.8 billion); EU, €46.0 million¹⁴ (\$6.7 billion); and World Bank, US\$510.0 million (\$56.7 billion). These CSs provide a clear focus on the priorities agreed upon between the Government and the MFIs moving forward.

SUSTAINABLE DEVELOPMENT & SCIENCE, TECHNOLOGY AND INNOVATION

SUSTAINABLE DEVELOPMENT (SD)

Sustainable development activities remained aligned with the national and sectoral strategies of *Vision 2030 Jamaica* and *MTF 2012–2015*. Selected thematic areas within the sector were supported by a \$10.1 billion budgetary allocation which accounted for approximately 1.9 per cent of the total GoJ budget.

Among the key activities undertaken within the sector were improvement in the policy and regulatory framework with the promulgation of the Dolphin Policy and approval of a number of Green and White Papers; the development and dissemination of materials to promote climate change awareness; and climate modelling and preparation of “near-term climate scenarios” (up to 2040) to aid decision making in a climate-sensitive economy. Completed during the year

was a national forest land use assessment, through the use of geospatial technologies, that revealed a net increase in forest cover of 0.4 per cent per annum between 1998 and 2013. The status of marine resources as measured by the Coral Reef Health Index was assessed as “fair” with the overall score remaining at 2.1. Net accretion in beach width was recorded, despite erosion in a number of sites.

The ongoing commitment to and investment in SD contributed to Jamaica remaining in the high human development category of the Human Development Index with a score of 0.715 and rank of 96 out of 187 countries and territories. In the social sphere, access to education remained relatively high at the lower levels of the education system, while overall, the school aged population (3–24 years) enrolled in educational institutions was 71.3 per cent. As it relates to health, latest available data from the Jamaica Survey of Living Conditions (JSLC) 2012 indicated that the health status of the population remained relatively good with 84.7 per cent reported as having generally good or very good health.

There was evidence of improved efficiency in the development applications process with 83.8 per cent of applications being processed within the targeted 90-day period and approximately three quarters of these being processed within a 60-day timeframe. This was supported by the full roll-out of the Application Management and Data Automation (AMANDA) System in Local Authorities and some commenting agencies as well as by the pre-screening activities of Development Applications Centre (DAC) at NEPA. Additionally, reforms to the Development Application Review Process (DARP) were approved by Cabinet with a view to expediting the review of applications by the relevant authorities, aimed at stimulating economic opportunities for overall growth and investment.

In terms of climate, increases in temperature and decreases in precipitation were recorded. The average meteorological drought indices showed that the country experienced severe drought for the June/July period while some parishes experienced periods of extreme to normal drought throughout the year. This affected water production and agricultural output. The latter was adversely affected, especially in the southern region encompassing the parishes of Manchester and St. Elizabeth (the two parishes that account for approximately 40.0 per cent of domestic agricultural production). The negative impact on the agricultural sector was aggravated

8. Administrative – Public Sector Reform, Budgetary Support, Governance.

9. Social Infrastructure – Health, Education, Housing, Safety Net.

10. Directly Productive – Agriculture, Tourism, Mining, Manufacturing, Micro, Small and Medium Business Enterprises.

11. Administrative – Public Sector Reform, Budgetary Support.

12. Environment & Climate Change – Natural Resource Management, Ecosystem Preservation, Disaster Risk Management Reduction.

13. Net Flow equals Total Disbursements less Total Repayments.

by bush fires occasioned by the dry and windy conditions experienced in some areas throughout the year.

Fire hazards continued to adversely affect lives and property resulting in an increase in deaths, injuries and persons rendered homeless (by 10.5 per cent, 15.7 per cent and 12.7 per cent, respectively relative to the previous year). Environmental management was supported by the expanding use of technology. In this regard, geospatial technologies were increasingly used to improve decision making related to parcel data maintenance, forest management, subdivision and the building approval process, landscape development, climate change scenario modelling, drought impact, water resources monitoring and biodiversity and ecosystems management. An assessment of the growth of geospatial technologies indicated that 76.0 per cent of the respondents effectively integrated GIS into mainstream operations or business processes.

SCIENCE, TECHNOLOGY AND INNOVATION (STI)

As a means of advancing the STI-driven growth agenda outlined in *Vision 2030 Jamaica*, emphasis was placed on STI policy development and institutional strengthening. This was supported by activities aimed at improving Science, Technology, Engineering and Mathematics (STEM) education, and broadening access to and use of Information, Communication and Technology (ICT). Allocations to the main STI MDAs increased by 64.4 per cent to \$5 509.4 million, or approximately 1.0 per cent of the national budget.

The development of sustainable agricultural production systems as a means of ensuring food security and creating wealth, continued to influence the national research agenda. Variety improvement and productivity trials in ginger resulted in higher yielding clones (up to 1.47 kg per plant) of the Jamaica yellow and frog blue varieties. These results signal the potential for mass propagation using technology such as tissue culture to produce sufficient quantities of ginger to meet the commercial demands.

Ongoing developments in the area of STEM education included the transformation of the Sydney Pagon High School to a STEM Academy and the continued roll-out of the E-Learning Jamaica and Tablets in Schools (TIS) projects. The latter two initiatives aim to improve learning through the use of ICTs. Under the TIS project, a total of 19 839 tablets were distributed to students (18 725) and teachers (1 114) in 35 schools.

Expansion in the ICT infrastructure, and the use of technologies to improve service provision and enhance business efficiencies was evidenced in Jamaica's improved scores on the ICT Development Index (IDI) to 4.26 and the Networked Readiness Index (NRI) to 3.8. With respect to performance on the IDI, the country continued to do relatively well on the sub-index of Political and Regulatory Environment. Improved performance was also recorded on the NRI sub-indices of access and use. In the area of

e-government, the country ranked 109 of 193 United Nations member countries on the E-Government Development Index.

At least 12 additional e-government services came online in 2014, including applications such as the Jamaica Customs Agency (JCA) ASYCUDA World, an automated customs management system being piloted for commercial exports at Port Bustamante. ICTs continued to enhance the ease of doing business across all sectors, including the Banking Sector. The combined value of transactions processed at Automated Banking Machines and Point of Sale machines, for example, was \$756.9 billion for JMD transactions and \$699.1 million for USD transactions. These figures reflected respective increases of approximately 14.0 per cent and 13.3 per cent relative to 2013, and correlate to a steady rise in the volume of transactions at ABM and POS terminals for both dollar denominations. Efforts aimed at strengthening the national cyber security framework was boosted by the establishment of a Cybersecurity Emergency Management Response Team in December.

In support of the implementation of the National Energy Policy (2009–2030), Power Purchase Agreements were signed with three preferred bidders to add approximately 78.0 MW of renewable energy generating capacity to the grid by 2016. This is to be achieved via a combination of wind and solar photovoltaic (PV) systems to be located in the parishes of St. Elizabeth (wind); Manchester (wind); and Clarendon (solar PV).

With respect to the institutional framework for STI, the National Commission on Science and Technology (NCST) was reconstituted in October as the main coordinating mechanism for the sector, with a view to making STI efforts more impactful and sustainable. To this end, two priority actions were mandated, namely, the preparation of a national STI Policy and the development of a conceptual framework for the expansion and sustainability of a National Nutraceuticals Industry.

THE ECONOMY

MACROECONOMIC POLICIES AND PERFORMANCE

Jamaica's macroeconomic policy framework continued to be guided by MTF 2012–2015 and is aligned with the Memorandum of Economic and Financial Policies (MEFP) which accompanied the Letter of Intent of the External Fund Facility Agreement. The MEFP outlines the key economic strategies and reforms to reduce the high burden of debt, improve the environment for doing business, and support increased employment and sustained economic growth. Strategies and reforms which received priority attention during 2014 included:

— Tax Reforms

- establishment of a Minimum Business Tax

- implementation of the first phase of the amalgamation of payroll taxes
- Amend the GCT Act to broaden the tax base and eliminate zero rating government purchases
- adoption of a New Fiscal Rule aimed at enhancing fiscal transparency and lock in the gains of fiscal consolidation
- **Debt Reduction:** through enhanced fiscal management; policies to strengthen growth performance; and additional measures such as debt-asset swap and asset sales
- **Public Sector Reform:** aimed at improving the efficiency, quality and cost effectiveness of the public service
 - to reduce the relative size of the public service through the elimination of redundant posts, attrition, prioritizing the implementation of growth enhancing initiatives and enhancing the transparency in operations of the public bodies
- **Monetary and Exchange Rate strategies:** aimed at achieving a gradual reduction in the rate of inflation which is consistent with those in the economies of Jamaica's main trading partners. This is intended to foster greater stability in the exchange rate market, improve trade competitiveness by avoiding any appreciation in the real effective exchange rate (REER), and engender greater levels of confidence in the domestic economy
- **Growth Enhancing Reforms:**
 - initiatives to improve the business environment
 - improve the Development Application Process to significantly reduce the timeframe for final decisions
 - enact an Insolvency Act to create an orderly process for declaring bankruptcy
 - reduce the time for entrepreneurs to receive an electricity connection
 - phased implementation of a Port Community System to electronically integrate and streamline export and import procedures
 - Strategic Investments: through the facilitation of major private sector projects in the areas of Tourism; Business Process Outsourcing; Energy; and Port Expansion and Development.

For fiscal year 2014/15, the main macroeconomic performance targets were:

- Real GDP of 1.4 per cent
- Inflation rate within the range of 7.0 per cent to 9.0 per cent
- Primary surplus of 7.5 per cent of GDP
- Net International Reserve (NIR) stock of US\$1 594 million
- Fiscal Deficit of 0.5 per cent of GDP
- Current Account Deficit of 8.0 per cent of GDP.

Economic Performance

The Jamaican economy recorded real value **added growth of 0.4** per cent, reflecting an expansion in output by the Services Industry which outweighed a contraction of 0.1 per cent in the Goods Producing Industry. The Services Industry grew by 0.5 per cent, reflecting growth in all industries, except Electricity & Water and Producers of Government Services. Growth in Services was pushed mainly by the performances of Hotels & Restaurants and Transport, Storage and Communication industries. The slower than targeted rate of growth was largely explained by the impact of severe drought conditions which curtailed the performance of the Agriculture Industry, Agro-processing and water production during the latter half of the year.

The overall positive performance was supported by:

- improved economic performance recorded in the economies of Jamaica's main trading partners which resulted in increased demand for some locally produced goods and services.
- the continued implementation of business reforms as well as the strategic investment projects in the areas of construction, tourism and Business Process Outsourcing.

For April–December 2014, Central Government operations generated a fiscal deficit of \$26.0 billion compared with a deficit of \$33.9 billion. This out-turn was due to both Expenditure (excluding amortization) and Revenue & Grants being less than programmed. The shortfall in Revenue & Grants was the result of lower than anticipated revenue from Tax Revenue and Grants. Additionally, the primary surplus of \$66.8 billion was \$0.8 billion more than budgeted.

Jamaica's **merchandise trade deficit** was US\$4 386.2 million, an improvement of \$163.3 million relative to 2013. The narrowing of the deficit reflected a decline of US\$291.6

million in spending on imports, which outweighed the impact of a reduction of US\$128.4 million in export receipts. The lower expenditure on imports largely reflected reduced spending on Mineral Fuels, etcetera—the primary import category—which fell by US\$240.4 million relative to 2013 due to lower imports of petroleum, petroleum products and related materials. The fall-off in receipts from exports stemmed from declines in seven categories, with Chemicals, Food, Mineral Fuels, etcetera and Beverages & Tobacco accounting for the largest absolute declines. Earnings from Chemicals declined by 75.2 per cent to US\$28.2 million due to the continued impact of lower ethanol exports.

The *Inflation* out-turn for 2014 was 6.4 per cent, 3.1 percentage points lower than the rate recorded for 2013 and represented the lowest rate recorded since 2011. Inflationary impulses during 2014 stemmed mainly from:

- the impact of severe drought conditions
- increase in bus fares for Jamaica Urban Transit Company (JUTC) adult passengers
- the pass-through effect of the depreciation of the domestic currency
- increase in the National Minimum Wage.

The inflation out-turn was, however, constrained by weak domestic demand conditions and lower international crude oil prices.

At the end of 2014, the *exchange rate* was \$114.66 per US\$1.00, representing a nominal depreciation of 7.2 per cent compared with the rate at the end of 2013. This translated into real depreciation of the Jamaica dollar relative to the United States dollar of 1.6 per cent.

SECTORAL PERFORMANCE

GOODS PRODUCING INDUSTRY

Agriculture

The Agriculture, Forestry & Fishing industry declined by 0.4 per cent. In the first half of the year, the industry improved by 15.2 per cent relative to the corresponding period of 2013. However, drought conditions in the second half of the year detracted from the gains of the first six months with a 16.7 per cent decline in output. The drought conditions affected planting activities and caused crop yields to be reduced. Although rainfall levels improved in the latter months of the year, production was already adversely impacted.

The Planning Institute of Jamaica's Agriculture Production Index indicated that gross output contracted for the sub-industries Other Agricultural Crops, Post Harvest Activities and Fishing by 7.6 per cent, 25.0 per cent and 0.7 per cent, respectively. The downturn was, however, partly mitigated by increased output in the categories Traditional Export Crops and Animal Farming, which grew by 30.5 per cent and 4.4

per cent, respectively. The increase in output for Traditional Export Crops was attributed to improved output for the crops Banana, Sugar Cane and Cocoa. The improvement in Animal Farming was mainly due to the increase in poultry production. Export earnings from traditional agricultural commodities were valued at US\$17.0 million compared with US\$22.1 million in 2013. Reduced earnings were recorded for Coffee, Citrus and Pimento, which outweighed improved earnings for Banana and Cocoa.

Mining and Quarrying

The Mining and Quarrying industry recorded a 0.9 per cent increase in real value added for 2014, which represented a 2.3 per cent contribution to GDP, the same as 2013. The higher output of crude bauxite (up 2.8 per cent) drove the performance of the industry while production of alumina declined by 0.2 per cent. Alumina production was negatively affected by an unscheduled interruption in activities at one plant and the lower quality of bauxite at another plant. Export earnings from the local bauxite/alumina sub-industry grew in response to increased global demand for aluminium which influenced higher commodity prices. The growth in export earnings was driven by a higher price for alumina and an increase in the volume of crude bauxite exported. A further increase in export earnings was, however, stymied by a lower volume of alumina exported (down 4.1 per cent). The Industrial Minerals component of the industry also grew as five of the eight minerals recorded increases. This was in response to the performance of the Construction industry where several of these are used as inputs for building activities.

Manufacture

Real value added for the Manufacture industry contracted by 1.2 per cent for 2014. This resulted from a decline in the Other Manufacture sub-industry, while the Food, Beverages & Tobacco sub-industry grew. The performance of the industry was adversely impacted by lower demand for several products due partly to the weak economic environment locally and the closure of some plants. There was exchange rate depreciation which affected some manufacturers positively by increasing the competitiveness of products for the domestic market and exports, but negatively for others, by increasing the cost of productive inputs. There was also higher production of some commodities which partly reflected growth in related industries such as Construction.

The value of manufactured exports was US\$680.4 million, a reduction of US\$113.5 million in earnings relative to 2013. The lower earnings was reflective of declines in Traditional Exports and Non-Traditional Exports of US\$1.1 million and US\$112.4 million, respectively.

Construction

The Construction industry grew by 1.4 per cent in 2014 and accounted for 7.2 per cent of GDP compared with 7.1 per cent in 2013. The performance of the industry was due to increases in the Other Construction and the Building Construction

subcategories. The Other Construction subcategory, which was the main driver for the industry, recorded an increase in civil engineering activities by the National Road Operating and Construction Company Limited (NROCC) and the telecommunications sub-sector. The activities undertaken by NROCC supported the construction of the Caymanas to Linstead, and the Moneague to Ocho Rios segments of the North-South link of Highway 2000. The telecommunications sub-sector focused mainly on the expansion and improvement of mobile and broadband technology. Growth in the Building Construction category was due largely to an increase in Non-Residential activities which included the expansion of Business Processing Outsourcing facilities and the restoration and construction of hotels. However, a decline in Residential activities evidenced by lower housing starts and completions constrained a higher output level from the industry. There was an increase in the production of some inputs such as sand & gravel, cement and limestone which was consistent with the overall performance of the industry.

SERVICES INDUSTRIES

Energy, Electricity and Water

The Electricity & Water Supply industry contracted by 1.2 per cent compared with 2013, reflecting reductions in electricity consumption and water production. Lower demand was the primary cause for contraction in electricity consumption, while the severe drought condition was the main factor contributing to the decline in water production.

Electricity generation decreased by 0.8 per cent to 4 107.5 GWh relative to 2013. This was impacted by a 7.9 per cent fall in output from non-JPS sources to 1 656.8 GWh which outweighed a 4.6 per cent increase to 2 450.7 GWh in production from JPS. Challenges associated with some Independent Power Producers which resulted in the shutdown of some generation units for extended periods contributed to this decrease in generation from non-JPS sources. Operations at JPS were boosted by the commissioning of the Maggotty Hydroelectric Power Plant in March 2014. Electricity sales contracted by 0.9 per cent to 2 997.8 GWh due mainly to reduced demand while revenue grew by 2.2 per cent to \$112.5 billion as a result of increases in the rates charged and the number of customers on the grid.

The National Water Commission produced approximately 296 139.5 megalitres of water, a reduction of 0.6 per cent relative to 2013. This largely reflected lower output from Kingston, St. Andrew and St. Thomas which outweighed increased output in Other Parishes. The total amount of water consumed for the year fell by 10.2 per cent to 82 829.2 megalitres, caused mainly by severe drought conditions experienced during the April–June and July–September quarters of 2014. Non-revenue water represented 72.0 per cent of total production, an increase from 69.0 per cent in 2013. The number of connections expanded by 1.6 per cent to 466 695 as revenue rose by 17.7 per cent to \$26.3 billion, attributable to tariff adjustments effected during the year.

Transport, Storage and Communication

Growth of 1.1 per cent was recorded for the Transport, Storage & Communication industry during 2014 relative to 2013. The higher real value added reflected improved performances in both the Transport & Storage and Communication segments of the industry. The year's out-turn was supported by increased activities at both seaports and airports, as well as the telecommunications subcategory, which accounted for the expansion in the Communication segment of the industry. The output for some indicators in the industry showed:

- the volume of cargo handled at 15 424 thousand tonnes, up 2.3 per cent. This resulted from expansion in activities at the Port of Kingston, up 13.3 per cent to 10 995 thousand tonnes and Outports, up 0.1 per cent to 10 417 thousand tonnes. The out-turn at the Port of Kingston reflected increased activities at the KCT and the Private Wharves
- passenger movement at 5 087 171 passengers, up 4.6 per cent. Increased passenger traffic at the island's international airports stemmed from growth in the heavier-weighted arriving and departing passenger categories at all three international airports. The introduction of new service initiatives, among other things, boosted the out-turn at the SIA and the NMIA
- mobile subscribers and total telephone subscribers, went up by 1.2 per cent to 2.9 million and 3.1 million, respectively. The growth in fixed lines indicates a turnaround in the declines noted over the past years.

A 16.2 per cent fall-off to 45.9 million pieces was recorded for the volume of mail handled at the Post & Telecommunications Department. Similarly, there were respective declines of 14.9 per cent and 9.4 per cent in revenue and expenditure to \$1 498 million and \$1 906 million. This translated to a 21.8 per cent increase in the deficit to \$408.0 million.

Finance & Insurance Services

The Finance & Insurance Services industry grew by 0.2 per cent compared with 2013, representing the third consecutive yearly growth. This performance was attributed largely to a rise in Total Assets at deposit-taking institutions, more revenue earned from fees and commission, an increase in earnings at general insurance companies, and greater returns earned from investments.

The growth of the Finance & Insurance Services industry was, however, stymied by the continued impact of the National Debt Exchange as companies earned less on their security investments. Commercial banks were affected by the real decline in the stock of Loans & Advances which directly impacted net interest income. In addition, the Jamaica Stock Exchange's (JSE) main market declined by 5.3 per cent.

Hotels & Restaurants

The United Nations World Tourism Organization estimated that global tourist arrivals increased during 2014. Regionally, the Caribbean Tourism Organization reported growth in tourist arrivals for most countries. Locally, the Ministry of Tourism and Entertainment 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 & Restaurants¹⁴ industry grew by an estimated 2.9 per cent and contributed 0.3 per cent to growth in Gross Domestic Product during 2014. This was due to increased stopover arrivals. The increase in stopover arrivals reflected mainly more visitors from the United States of America (USA), Canada and Europe. The improved performance was a result of increased airlift from these regions.

Cruise passenger arrivals grew by 12.5 per cent to 1423797 persons. This improvement reflected increased activities at the Falmouth, Montego Bay, Ocho Rios and Port Antonio cruise piers. Similarly, the number of ship calls to the island's ports also increased, moving to 412 from 360 in 2013.

Provisional tourist expenditure amounted to US\$2 235.7 million, 5.8 per cent more than in 2013. Of this amount, stopover visitors expended US\$2 111.8 million while cruise passengers spent US\$123.9 million. The average annual employment in the Hotels and Restaurants industry was 80 500 persons compared with 75 750 persons during 2013. This represented approximately 7.1 per cent of total employment for 2014 and 6.8 per cent for 2013. The average number of males employed within the industry totalled 31 925 relative to 31 375 in 2013. For females, the average number employed was 48 575 compared with 44 375 in 2013.

Wholesale & Retail Trade; Repair & Installation of Machinery

The WRTRIM industry grew by 0.2 per cent and accounted for 17.6 per cent of GDP. The industry's performance was influenced by an increase in the stock of Loans & Advances to distributors and consumers; a real increase in the value of Automated Banking Machine (ABM) and Point of Sale (POS) transactions; and a real increase in remittances and improvements in the Business and Consumer index. A contraction in the value of imports, weak domestic demand and reduced capital expenditure tempered the industry's growth. Analysis of preliminary General Consumption Tax (GCT) data revealed that three of the eight goods categories recorded higher sales. These were: Wholesale & Repair of Household Goods; Hardware, Building Supplies, Electrical

Goods & Machinery; and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores.

Distributive trade activities continued to be governed by the Bureau of Standards Jamaica, Consumer Affairs Commission, Fair Trading Commission, and the Trade Board aimed at ensuring competitive markets, protection of consumers' rights, adherence to regulatory standards and a modern commercial system and environment.

Entertainment & Sports

The Other Services industry — of which the Recreational, Cultural and Sporting (RCS) sub-industry accounts for one-third of the industry — recorded growth of 1.2 per cent in real value added for 2014. During the year, there was an emphasis on policy development in entertainment and sports, particularly with respect to intellectual property and athletics. Economic activity related to entertainment showed signs of improvement evidenced by higher gross sales to entertainment categories; increases in the volume and value of amusement licences issued; and an increase in the stock of loans and advances issued for entertainment purposes. With respect to sport, the Sports Development Foundation increased its expenditure on infrastructure projects in various disciplines.

THE SOCIAL SECTOR

DEMOGRAPHICS AND THE LABOUR MARKET

Population

The population was estimated at 2 723 200 at the end of 2014 with a growth rate of 0.2 per cent. The rate of natural increase was 7.4 per 1 000 with estimated births and deaths at 37 900 and 17 600, respectively, and net external movements at 14 900. Migration continued to impact the growth rate which is currently on target with the National Population Policy. The majority of migrants from Jamaica go to the USA.

Jamaica is currently at an advanced stage of the demographic transition. This is evident in the demographic ageing of the population (declining birth and death rates). The effects of the ageing population structure are apparent in the declining child population (0–14 years) and the increasing working age (15–64 years) and dependent elderly population (65+ years). There is also a growing number of the population residing in urban areas.

Several activities were undertaken throughout the year in an effort to ensure population dynamics were incorporated into national policies, plans and programmes. These included the Launch of the International Conference on Population and Development (ICPD) National Report; finalization of goals and development of indicators for the Post-2015 Development Agenda; submission of the draft National Policy and Plan of Action on International Migration and

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

Development to Cabinet for approval; and the Modernization of Civil Registration and Vital Statistics (CVRS) through technical advice and capacity building.

Labour Market

The Jamaican labour market exhibited signs of recovery amidst instability, heightened unemployment and a widening in the employment gap globally. The labour force exhibited a 0.01 per cent decline to 1 307 725 with males (54.7 per cent) outnumbering females. Average employment locally grew by 1.7 per cent to 1 128 050 persons in 2014. Unemployment fell by 9.9 per cent to 179 675 from 199 550 persons. Both youth and adult unemployment rates trended down from 37.7 per cent and 11.6 per cent to 34.2 per cent and 10.1 per cent, respectively, with female unemployment remaining higher.

The growth in employment was also highlighted in both the Services and Goods Producing Industries which increased by 1.9 per cent and 1.4 per cent, respectively. A total of 773 950 persons remained outside the labour force with 60.4 per cent of those persons being female. The percentage of persons in the labour force without training was 70.2 per cent. Of this amount, males accounted for 60.3 per cent.

The Employment (Flexible Work Arrangements) (Miscellaneous Provisions) Act, 2014 was passed by both Houses of Parliament and became effective in November. This resulted in the amendment of 24 pieces of legislation toward the implementation of flexible work arrangements in Jamaica.

HUMAN DEVELOPMENT, WELFARE AND CULTURE

Education and Training

The Ministry of Education (MOE) in 2014 continued its focus on the priority areas of Early Childhood Development; Special Education; Media and ICT in Education; Improvement in Teacher Quality; Access to and quality of tertiary education; Increased access to Technical and Vocational Education and Training (TVET) including its infusion in the formal school system and the introduction of the STEM methodology.

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).

In relation to access, a total of 6 960 school spaces were created. This included two new basic schools and a primary school. One high school was completed and opened for the new school year in September and a private school was converted into a Government-funded high school. Additionally, there were also expanded school spaces at three high schools and one primary school.

The Human Employment and Resource Training/National Training Agency (HEART Trust/NTA) was repositioned to focus more directly on its mandate relating to training for

employment. HEART Trust/NTA and NCTVET facilitated training programmes in secondary schools and in the offerings of tertiary institutions aimed at preparing students for work. Thus Workforce Colleges and Training Institutes were established to offer higher level training for individuals who wish to pursue training in their vocational areas. Partnerships were forged to engender lifelong learning and to increase access to training opportunities for all persons.

An estimated 71.3 per cent (763 798 persons) of the school-age cohort (3–24 years old) were enrolled for the 2013/14 academic year. The total number of students enrolled in the public and private education institutions at the pre-primary, primary and secondary levels was 613 136. Gross Enrolment Rates (GER) for the cohorts were 99.8 per cent at pre-primary, 99.4 per cent at primary, 97.3 per cent at secondary and 28.9 per cent at the tertiary level. In training institutions, the number of persons trained in the Professional, Senior Officials and Technicians category was 15 760 (70.4 per cent females) while 62 451 persons (54.4 per cent female) were trained as skilled and semi-skilled personnel.

Health

Health care was delivered through a network of primary, secondary and tertiary level health facilities. Focus continued on primary health care renewal and two centres of excellence were opened. Bed complement in secondary care facilities improved by 0.2 per cent, due to renovations and reopening of some wards; this resulted in an increase in average bed occupancy to 76.7 per cent. While the latest available data from the *Jamaica Survey of Living Conditions 2012*, revealed that approximately 84.7 per cent of Jamaicans were reported as having generally good or very good health, there was an increase in admissions and the length of stay in hospitals, while there was a decline in the number of discharges. There was greater focus on efforts to reduce maternal and child mortality with the implementation of the Programme for the Reduction of Maternal and Child Mortality (PROMAC). Other strategic priority focus included revision of the National HIV Policy; approval and tabling of the Infant and Young Child Feeding Policy; and implementation of mortuary guidelines for the reduction of communicable diseases as part of the Ebola preparedness activities.

Demand for services in the public sector remained high. Immunization coverage by all health regions was on target. The number of Jamaicans accessing pharmacy services increased, with a reduction in the number of items that were dispensed, reflecting a decrease in the availability of a range of pharmaceutical items. The National Health Fund continued to expand individual benefits received by clients under the programme by adding new drugs for the treatment of chronic non-communicable diseases, which by virtue of the long duration of the diseases, increases the health burden, making treatment and compliance a priority for the MOH.

In the 3rd year of the Extended Fund Facility (EFF) agreement with the International Monetary Fund (IMF),

the government's allocation to the health sector remained relatively unchanged. The demands on services were further impacted by the outbreak of the Chikungunya Virus. This resulted in increased burden on the health facilities as an unbudgeted amount of resources had to be expended for interventions such as larvicidal activities, public education campaigns and capacity building among health care professionals. While there were limited resources impacting the sector, programmes continued in mental, oral and dental health, improvement of infrastructure in secondary and primary care facilities; and improvement in the cadre of health professional staff through capacity building and training in new specialities.

Social Development, Social Protection & Culture

Social development and improvement of the quality of life of various population groups continued to be the focus for the year, particularly in the context of increasing vulnerabilities brought about by global dynamics and local impacts. In the face of fiscal constraints, however, government remained committed to actions that would further enhance the capacity for economic growth, while maintaining gains made in social indicators. The first comprehensive Social Protection Strategy was launched, with the intention to provide greater structure and synergy to the provision of social protection to citizens. The Strategy was developed in keeping with the framework of *Vision 2030 Jamaica*, and the thrust towards the National Outcome of 'Effective Social Protection'.

During the year advances were made in legislative and policy reviews to support the protection and engagement of children and youth, as well as greater efforts at inclusion and empowerment of youth and women in the labour market. Gender mainstreaming in policies and programmes, and renewed focus on mitigating gender-based violence were central to the gender advocacy efforts. Further attention was given to the social and economic inclusion of persons with disabilities, and programmes to embrace the input and participation of senior citizens. The landmark National Disability Act was passed in Parliament, to strengthen the provisions in law for the protection of the rights of persons with disabilities. The arena of social protection continued to receive support from international development partners, through loan and grant financing that facilitated programme design and delivery, acquisition of technical services and technology, and the engagement of local stakeholders with international best practice models. Non-governmental organizations and the private sector provided meaningful input into the areas of social assistance and poverty alleviation. Community development, and the ongoing reforms in local governance structures, focused on empowering communities towards

greater employment, establishing requisite infrastructure and amenities, and enhancing community organization and social capital. Cultural goals centred on protecting the country's heritage, developing appropriate policy guidelines, and celebrating achievements in literature and the arts.

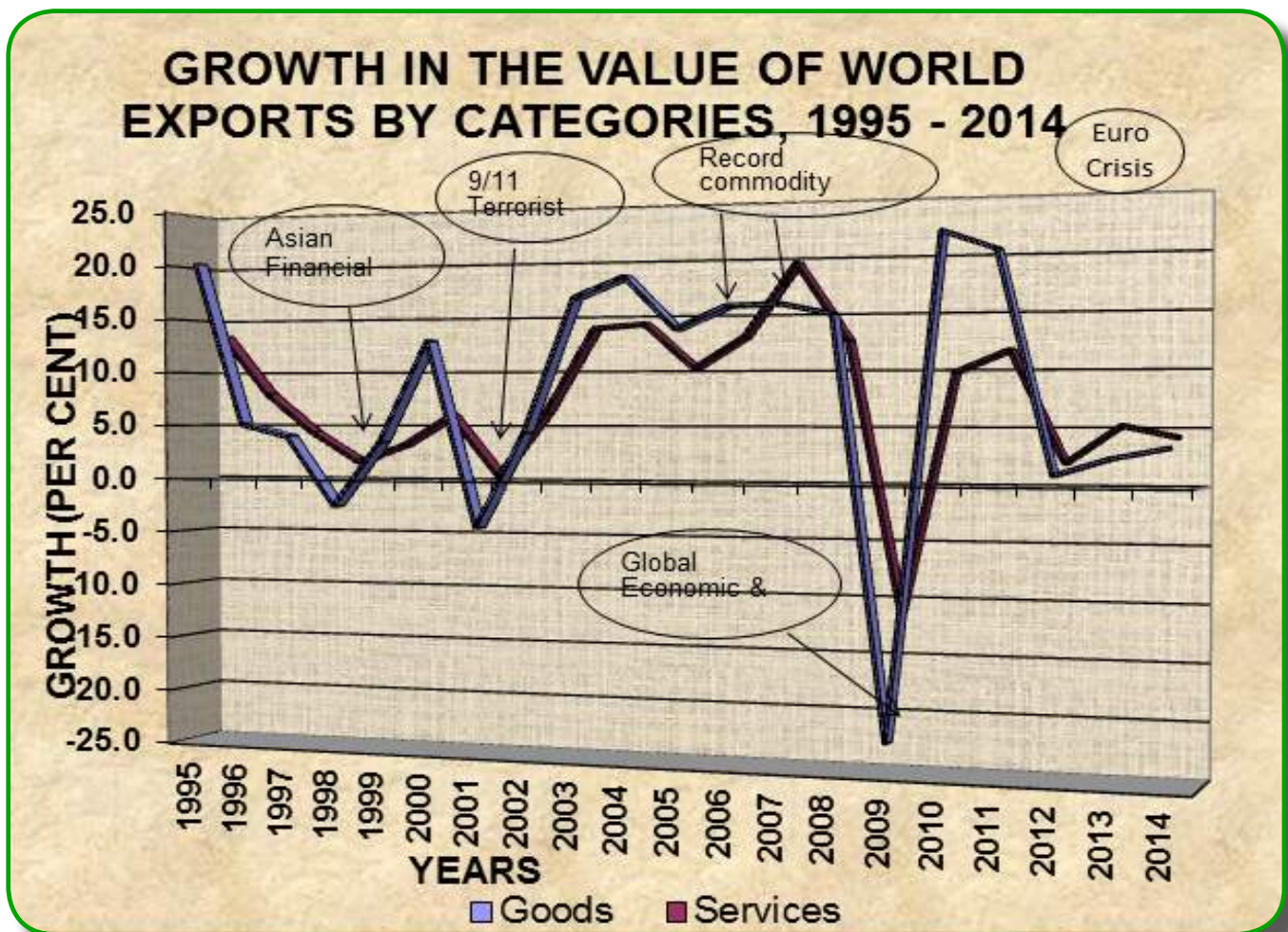
National Security and Justice

The country continued to experience a reduction in the number of reported Category 1 crimes. There were 1 005 reported murders, the lowest since 2003 when 975 murders were reported. In keeping with a recommendation from the 2006 strategic review of the Jamaica Constabulary Force (JCF), the Island Special Constabulary Force was merged into the JCF. The JCF continued to focus on criminal gangs and established the National Strategic Anti-Gang Unit in the Organized Crime Investigation Division to focus on the dismantling of these groups. The reduction in the incidence of corruption also continued to be a major issue and to this end the Major Organized Crime Task Force and the JCF's Anti-Corruption Branch were merged to form the Major Organized Crime and Anti-Corruption Agency. The training capacity of the JCF was enhanced with the merging of existing training units to form the National Police College of Jamaica. The College has three faculties that focus on Leadership and Professional Development; Skills Training; and Recruit and Probationary Training.

The revised National Security Policy was finalised after being presented in the House of Parliament and the Senate. The 3rd phase of the Citizens' Security and Justice Programme (CSJP III) will commence in January 2015 after the signing of the funding agreement in December. The CSJP III, which is a major social intervention initiative targeting communities with high levels of violence, will be implemented in 50 pre-selected communities across eight parishes.

Some 877 inmates were transferred from maximum security to medium/low security institutions as part of the Department of Correctional Service's reclassification and transfer exercise that aims to reduce the population in high security correctional facilities. Additionally, the well-being of inmates and wards at the island's correctional facilities was further enhanced with the implementation of the Suicide and Self Harm Plan. Work commenced regarding the establishment of a human rights institute, while reform of the justice sector continued with a number of initiatives being undertaken as part of the Justice Undertakings for Social Transformation (JUST) Programme. Construction of Justice Square located in downtown Kingston was completed, while renovations were made to a number of courthouses islandwide. Several pieces of legislation were also enacted or amended, while others were at various stages in the legislative process. ■

THE INTERNATIONAL ECONOMY



Graph generated by the Planning Institute of Jamaica

THE INTERNATIONAL ECONOMY

INTRODUCTION

Global economic output was estimated to have increased by 3.3 per cent, spurred by higher levels of consumer spending and business investment. This performance resulted from increased output in both Advanced and Emerging Market & Developing Economies. Growth was supported by: accommodative monetary policies; a moderation in fiscal consolidation; higher levels of employment in some economies; and the downward trajectory in oil prices, particularly in countries which are net importers of crude oil, among other factors. Consistent with growth of the world economy, global trade of goods and services increased.

Despite improvements, the performance of the global economy was weaker than forecast, reflecting the lower than expected performance of the Euro Area, Japan, as well as sections of Eastern Europe, owing to several challenges. These challenges constrained demand and confidence and resulted in a fall-off in foreign direct investment inflows. Additionally, despite strong growth, China's rate of growth slowed as a result of deliberate efforts to restructure the economy. Against this background, the International Monetary Fund (IMF), on several occasions, revised downwards its projection¹ for global growth for calendar year 2014.

Relative to 2013, commodity prices declined, evidenced by decreases in the World Bank's Energy and Non-Energy Commodities Price Indices. The downward trajectory in crude oil prices, which started in July 2014, stemmed primarily from supply-side factors. These factors included increased production from non-Organization of Petroleum Exporting Countries (OPEC) producing countries and OPEC's decision to maintain output levels despite the fall in prices. On the demand side, weakened global prospects adversely impacted demand. There was also a fall-off in the prices for fertilizers and some agricultural commodities, due to a slowing in demand; fall-off in input prices; and improved supply conditions. As a consequence, there was a moderation in global inflation.

The World Trade Organization (WTO) concentrated its efforts on the formal implementation of the Bali Package – a series of trade concessions adopted at the end of 2013. An impasse, with respect to an element of the Package, specifically, Trade Facilitation², stalled the post-Bali implementation programme. Subsequent to further negotiations, however, WTO members arrived at a consensus which allowed the General Council of the WTO to adopt Trade Facilitation into the regulatory framework of the WTO.

INTERNATIONAL ECONOMIC CONDITIONS

World Output

The global economy grew by an estimated 3.3 per cent during 2014, pushed by increased output in both Emerging Markets & Developing Economies and Advanced Economies (Table 1.1). Emerging Markets & Developing Economies grew by 4.4 per cent, driven by the countries of Asia, in particular, China. Led by the improved performances of the United States of America (USA) and the United Kingdom (UK), the group of Advanced Economies was estimated to have grown by 1.8 per cent. Growth in global economic activity was driven by increases in household consumption and business investment which were underpinned by several factors, among which were:

- Accommodative Monetary Measures – Subsequent to the 2008/2009 global financial and economic crisis, several central banks, particularly in Advanced Economies, adopted the use of accommodative monetary policies aimed at stimulating economic growth. These measures were:
 - i. Conventional Monetary Policies – which included the lowering of short-term interest rates. As a consequence, interest rates in Advanced Economies have approached 0.0 per cent. This trend continued during 2014 with: the Federal

1. The IMF in January 2014 initially projected global output to increase by 3.7 per cent. This was subsequently revised downwards to 3.6 per cent in April, 3.4 per cent in July and then to 3.3 per cent in October 2014.

2. Trade Facilitation refers to the procedures encountered in the movement of goods across national borders. The WTO aims to simplify and harmonize the process so as to reduce the time and costs incurred while trading.

Reserve of the USA maintaining its federal funds policy rate within the range of 0.0 per cent–0.25 per cent; the Bank of Canada’s policy rate remaining at 1.0 per cent; the Bank of England maintaining its rate at 0.5 per cent; the European Central Bank adjusting its three policy rates to fall within the range of -0.20 per cent–0.30 per cent; and the Bank of Japan maintaining the rate at 0.1 per cent.

- ii. Unconventional Monetary Policies – which included expansionary measures via Quantitative Easing (QE) policies, which are large-scale purchases of assets aimed at reducing long-term interest rates. The USA continued its third round of QE (QE3), introduced in 2012. However, against the background of improved economic performance the Federal Reserve ended the programme in the last quarter of the year. Similarly, the central banks of Japan and the Euro Area also employed the use of asset buying programmes to stimulate the economy.
- Waning of fiscal consolidation measures – in many Advanced Economies, the immediate pressures associated with wide public deficits weakened. This facilitated a moderation in the pace of fiscal consolidation, as countries tried to find a balance between controlling public expenditure and supporting growth initiatives. In the USA, for example, the reduction in unemployment benefit claims provided additional resources for use in other areas of the economy.
- Downward trajectory of commodity prices – the decline in commodity prices resulted in a shift in resources from net exporters to net importers. In the case of many commodity-importing countries, lower prices reduced inflationary, balance of payment and fiscal pressures. Furthermore, the fall in international commodity prices increased the purchasing power of consumers.

Growth occurred in spite of the emergence or continuation of several challenges. These challenges included:

- Political and geopolitical disturbances – These included the political unrest in the Ukraine and the associated geopolitical tensions involving Russia. The ensuing geopolitical turmoil worsened growth prospects for the affected countries, as well as for neighbouring countries in the Commonwealth of

Independent States³ (CIS). There also continued to be turmoil in the Middle East, specifically in Iraq, with the insurgency of the Islamic State of Iraq and Syria (ISIS). These disturbances threatened investor confidence and initially caused oil prices to increase as the market perceived threats to crude oil and natural gas supply.

- Weaker than anticipated performance of some economies – Economic performance of some Advanced Economies, Japan and some members of the Euro Area, was weaker than forecast. This translated to a decline in confidence levels, worsened growth prospects and weak investments. Additionally, while net commodity importers benefited from the persistent decline in prices, growth prospects for commodity exporters worsened, due to worsening terms of trade and declines in export income. Oil exporting countries, many for which a substantial share of revenue result from oil-related exports, encountered fiscal challenges.

Growth within the group of Advanced Economies was estimated at 1.8 per cent. This out-turn was driven by the performance of the USA which grew by 2.4 per cent, consequent on expansions in: Personal Consumption Expenditure; Gross Private Investment; Government Consumption Expenditure; and Net Exports. Factors supporting these increases were: improvements in the labour market reflected in an increase in the number of employed persons and a reduction in the unemployment rate; favourable financial conditions associated with accommodative monetary policy; a decline in contractionary fiscal policy evident in the increase in state and local expenditure, though federal expenditure continued to contract; and improvements in the housing market reflected in an increase in residential construction.

Output from Canada grew by 2.4 per cent. Contributing to this out-turn was increased private domestic demand, government spending, and private investment. The Canadian economy also benefited from the growth in the economy of the USA, reflected in a higher level of factory exports.

Japan recorded real GDP growth of 0.1 per cent. This out-turn reflected the combined effect of: (i) growth in the first quarter of the year, spurred by increases in domestic demand and capital expenditure; (ii) contractions in the second and third quarters, attributed to a decline in household consumption. This fall-off reflected the impact of a rise in consumption tax, initiated to increase government revenues and curb the country’s overall debt, the highest among the group of Advanced Economies⁴; and (iii) a return to growth in the fourth quarter driven by an increase in exports.

3. The Commonwealth of Independent States is a regional organisation of some former USSR states. Members include Russia, Belarus, Armenia, Azerbaijan and Kazakhstan.

4. During 2014, Japan’s gross debt was estimated at 245.1 per cent of GDP.

TABLE 1.1
ANNUAL PER CENT CHANGE IN GLOBAL OUTPUT AND TRADE, 2010 - 2015

REAL GDP	2010^r	2011^r	2012^r	2013^r	2014^p	2015^{proj}
World Output	5.1	3.9	3.1	3.3	3.3	3.5
Advanced Economies	3.2	1.7	1.4	1.3	1.8	2.4
United States of America	3.0	1.8	2.8	2.2	2.4	3.6
Canada	2.3	2.5	1.7	2.0	2.4	2.3
Japan	4.4	-0.6	1.4	1.6	0.1	0.6
Euro Area	1.9	1.5	-0.7	-0.5	0.8	1.2
Germany	3.6	3.4	0.9	0.2	1.5	1.3
France	1.4	2.0	0.0	0.3	0.4	0.9
Italy	1.5	0.4	-2.5	-1.9	-0.4	0.4
United Kingdom	2.1	1.1	0.3	1.7	2.6	2.7
Other Advanced Economies	5.8	3.2	1.9	2.2	2.8	3.0
Regional Groups						
Emerging Market & Developing Economies	7.3	6.2	4.9	4.7	4.4	4.3
Emerging & Developing Asia	9.5	7.8	6.4	6.6	6.5	6.4
China	10.4	9.3	7.7	7.8	7.4	6.8
Middle East, North Africa & Pakistan	4.3	3.9	4.1	2.2	2.8	3.3
Latin America & the Caribbean	6.1	4.6	3.0	2.8	1.2	1.3
Commonwealth of Independent States (CIS)	4.6	4.8	3.4	2.2	0.9	-1.4
TRADE IN GOODS AND SERVICES						
World Trade Volume (goods & services)	12.6	6.7	2.9	3.0	3.8	5.0
Exports (volume)						
Advanced Economies	12.2	6.2	2.0	2.4	3.6	4.5
Emerging & Developing Economies	13.5	7.2	4.6	4.4	3.9	5.8
Imports (volume)						
Advanced Economies	11.7	5.3	1.2	1.4	3.7	4.3
Emerging & Developing Economies	14.3	9.8	6	5.3	4.4	6.1

r - revised

p - preliminary estimate

proj - projections

Source : *IMF - WORLD ECONOMIC OUTLOOK - Update, January 2015*

Across Europe, the pace of economic growth was uneven, with output strongest in the UK; constrained in the Euro Area; and weakened in Eastern Europe. The economy of the UK recorded Gross Domestic Product (GDP) growth of 2.6 per cent, driven by a rise in household spending, which accounts for approximately 75.0 per cent of GDP. Also contributing to the improved out-turn were increases in investment and net exports. The increase in economic activity was concentrated in the Services Sector, in particular, the improved performances of the Business, Services & Finance and Distribution, Hotels & Catering industries.

Real GDP output of the Euro Area was estimated to have increased by 0.8 per cent, and was due to contrasting performances among the member states. Among the larger economies, growth was led by improved economic performances of Germany and Spain, and to a lesser extent, France. The Italian economy, however, contracted during

the review period. For the regional block, GDP levels remained below the pre-crisis level due in part to legacies of the 2008/2009 global financial and economic crisis. These included high unemployment and debt (public and private), as well as stresses in the banking sector⁵. The resulting weak demand led to low inflation and inflation expectations which worsened investment prospects. To address these challenges, the European Central Bank further eased its monetary policy stance by reducing interest rates to record lows. This stance was supported by unconventional monetary policy measures, inclusive of the purchases of bond and asset-backed securities, among other actions.

Economic activities grew by 4.4 per cent in Emerging Market & Developing Economies. This occurred despite a dampening in the performance of commodity exporting countries owing to a slowing in demand from China—the largest commodity

5. In 2010, seven European banks failed stress tests, indicating their inability to withstand major challenges. One bank was from Germany, another from Greece and five from Spain.

consumer—and internal structural constraints peculiar to individual countries.

Growth was strongest in Emerging & Developing Asia, reflecting mainly the performance of China, which grew by 7.4 per cent (see Table 1.1). This expansion was driven by increases in:

- Industrial Production – due to improved output of the Mining; Manufacturing; Electricity, Thermal Power, Gas & Production; and Supply of Water industries
- Investment in Fixed Assets – influenced by increased investments by the state and private investors
- Market Sales – brought about by increases in sales of retail goods as well as in the output of the catering industry.

The rate of growth recorded by China was, however, the lowest in over a decade. This slowing reflected ongoing reform efforts to restructure the Chinese economy towards engendering more sustainable growth. To achieve this, the authorities were focused on increasing private consumption as a share of GDP, while simultaneously reducing the reliance on investment and exports. Other countries within Emerging & Developing Asia, such as the ASEAN-5 and India⁶, also recorded improved economic performance reflecting increased domestic demand and favourable financial conditions.

The economic performance of Latin America & the Caribbean improved by 1.2 per cent. The region's fastest growing economies were the Dominican Republic, Panama and Bolivia, for which growth rates were within the range of 5.0 per cent to 7.0 per cent. Growth was pushed mainly by an expansion in gross fixed capital formation fuelled by public investment in infrastructure. In Brazil, GDP growth slowed⁷ due to the combined impact of tightened financial conditions and weak domestic consumption. The economies of Argentina and Venezuela were estimated to have contracted, the former due to macroeconomic imbalances and the impact of a default on international credit. For Venezuela, lower output reflected the impact of lower oil prices as well as policy distortions which constrained production. Within the Caribbean, economic growth was supported by improved economic performance by the USA which led to a higher demand for tourism services and increase in remittance inflows.

The economies of the Commonwealth of Independent States (CIS) recorded GDP growth of 0.9 per cent. The rate of growth was the lowest since 2009 and reflected the impact of ongoing geopolitical tensions arising from developments in

the Ukraine. Against a background of the Russian annexation of the Crimea region of the Ukraine, several countries led by the USA and the European Union, imposed sanctions against specified Russian citizens and businesses in finance, energy and weapons manufacturing. In response, the Russian Federation imposed counter sanctions. These developments resulted in a fall-off in investment and trade for Russia. Other CIS countries were also adversely impacted given their close economic ties to Russia.

Within the Middle East, North Africa, Pakistan and Afghanistan growth averaged 2.8 per cent. Growth emanated from, among other factors, the implementation of country specific reforms which facilitated increased productivity. This occurred notwithstanding political transitions and security challenges such as that posed by ISIS to the national security of Iraq, Syria and neighbouring countries. Sub-Saharan Africa grew by 5.1 per cent, supported by increased domestic demand derived from higher levels of private consumption and investment. However, prospects were affected by the Ebola outbreak in Guinea, Liberia and Sierra Leone.

World Trade

The volume of trade (goods and services) expanded by 3.8 per cent to meet the increased demand derived from the rise in global economic activities (see Table 1.1). Within Advanced Economies, exports rose by 3.6 per cent and imports by 3.7 per cent. For Emerging Market & Developing Economies, exports were 3.9 per cent higher while imports increased by 4.4 per cent.

The value of world exports (goods and services) amounted to US\$23 928.0 billion, up 3.5 per cent. The total value of Goods traded amounted to US\$19 299 billion, an increase of US\$628.0 million. For Services, the value traded increased by US\$186.0 million to US\$4 629.0 billion. Prices of manufactured goods declined by 0.2 per cent. This may be attributed to the lowering of input costs associated with the decline in commodity prices.

The Terms of trade of Advanced Economies increased by 0.2 per cent, while for Emerging Market and Developing Economies, it remained unchanged. This out-turn reflects a greater fall in the price of manufactured goods, the main export of Advanced Economies relative to the fall in the price of primary commodities.

Inflation

Regional inflation was generally lower relative to 2013, reflecting lower prices for food, energy and transport.

6. For 2014, GDP for the Indian economy was estimated to have grown by 5.8 per cent. Real GDP of the ASEAN-5 which includes Indonesia, Malaysia, Philippines, Thailand and Vietnam averaged 4.8 per cent.

7. GDP for 2014 was 0.1 per cent, while for 2013 the growth rate was 2.5 per cent.

TABLE 1.2
ANNUAL AVERAGE PER CENT CHANGE IN CONSUMER PRICES 2010-2014

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014
Advanced Economies	1.5	2.7	2.0	1.4	1.6
United States of America	1.6	3.1	2.1	1.5	2.0
Japan	-0.7	-0.3	0.0	0.4	2.7
Germany	1.2	2.5	2.1	1.6	0.9
France	1.7	2.3	2.2	1.0	0.7
Italy	1.6	2.9	3.3	1.3	0.1
United Kingdom	3.3	4.5	2.8	2.6	1.6
Canada	1.8	2.9	1.5	1.0	1.9
Memorandum:					
European Union	2.0	3.1	2.6	1.5	0.7
Emerging Market & Developing Economies	5.9	7.3	6.1	5.9	5.5
Developing Asia	5.1	6.5	4.7	4.7	4.1
Middle East & North Africa	6.5	9.2	9.7	9.0	7.6
Latin America & the Caribbean	6.2	6.8	6.1	7.1	n/a
Commonwealth of Independent States	7.1	9.8	6.2	6.4	7.9

r - revised

n/a - not available

Source : *IMF - WORLD ECONOMIC OUTLOOK, October 2014*

Prices of internationally traded food commodities were constrained by record harvests in wheat, rice and maize which served to increase the availability of supplies. Energy and transportation-related prices were influenced by the movement of global crude oil prices, increasing in the first half of the year, then consistently declining since July. In addition to international influences, domestic prices were impacted by country specific factors.

Inflation in Emerging Market & Developing Economies averaged 5.5 per cent (Table 1.2). This compared with 5.9 per cent recorded in 2013. Among these economies, the CIS recorded the highest rate of 7.9 per cent, reflecting the impact of geopolitical turmoil in the region. The increase in the price levels of the Middle East & North Africa, 7.6 per cent, also reflected in part the impact of political disturbances in parts of the region.

Within the group of Advanced Economies, inflation was generally below central bank policy target⁸, indicating output gaps⁹ in these countries. In the European Union, in particular, weak demand in some countries facilitated persistently low inflation. Outside of Europe, Japan and the USA recorded the largest average price increases of 2.7 per cent and 2.0 per cent, respectively. The out-turn for Japan reflected the impact of monetary and fiscal policies geared towards ending persistent declines in consumer prices.

Employment Trends

Global economic recovery has not been enough to sufficiently engender employment creation needed to close the jobs gap created by the 2008/2009 global financial and economic crisis. The global unemployment rate was 5.9 per cent, 0.1 percentage point lower than the rate recorded for 2013 (Table 1.3a). However, unemployment levels increased. Global unemployment stood at 201.3 million, 1.2 million more than 2013 and 30 million greater than 2007. Data for 2014 indicated that within the labour market, youths continued to be disproportionately impacted by the crisis, notwithstanding improved educational attainment. Youth unemployment was 13.0 per cent, approximately three times that of adults. Globally, women continued to have higher rates of unemployment relative to men and were less likely to participate in the labour force.

Regionally, North Africa and the Middle East recorded the highest rates of unemployment at 12.5 per cent and 11.0 per cent, respectively (see Table 1.3a). This was due to the impact of lower oil prices, political conflicts and national security risks on the labour market of these countries. Among Emerging Market & Developing Countries, South Asia recorded the lowest unemployment rate (3.9 per cent). Contributing to this relatively low rate were unemployment and poverty reduction programmes instituted in countries such as India, Nepal and

8. Most central banks of Advanced Economies target inflation of 2.0 per cent.

9. The output gap is the difference between actual GDP and potential GDP.

TABLE 1.3a
GLOBAL UNEMPLOYMENT RATE BY REGIONS 2010 - 2014

	2010	2011	2012	2013 ^r	2014 ^p
World	6.1	6.0	6.0	6.0	5.9
Developed Economies & European Union	8.8	8.4	8.6	8.5	7.8
Central & South-Eastern Europe & CIS	9.2	8.5	8.0	7.8	7.7
East Asia	4.2	4.3	4.4	4.5	4.6
South-East Asia & the Pacific	4.7	4.4	4.1	4.3	4.3
South Asia	3.8	3.8	3.9	3.9	3.9
Latin America & The Caribbean	7.3	6.7	6.6	6.3	6.6
Middle East	11.1	10.8	10.9	10.9	11.0
North Africa	10.4	11.8	12.1	12.4	12.5
Sub-Saharan Africa	7.6	7.6	7.6	7.7	7.7

r - revised

p - preliminary estimate

Source: ILO, Global Employment and Social Developments, January 2015

Bangladesh. In contrast, the unemployment rate in East Asia continued to increase, averaging 4.6 per cent for 2014 (see Table 1.3a). This increasing trend reflected, in part, the slowing in the rates of growth of the East Asian economies.

In Advanced Economies, the average unemployment rate was 7.3 per cent, down from 7.9 per cent recorded in 2013 (Table 1.3b). The Euro Area recorded the highest unemployment rate at 11.6 per cent. This out-turn was 0.3 percentage point below the rate for 2013 and reflected lower rates in 10 of the 18 member states of the Union. In Japan, the unemployment rate was 3.7 per cent, which was lower than its pre-crisis rate of 3.8 per cent in 2007.

INTERNATIONAL TRADE POLICY

World Trade Organization (WTO)

The WTO continued work geared towards fulfilling its mandate to ensure that trade flows as smoothly, predictably and freely as possible. Accordingly, work progressed on the implementation of the Bali Package¹⁰, a set of trade agreements adopted in 2013. As WTO members negotiated, India refused to ratify the Trade Facilitation Agreement, a key component of the Bali Package, citing concerns about rules restricting developing countries' food stockholding schemes. India's stance threatened the implementation of the Bali

TABLE 1.3b
UNEMPLOYMENT RATE FOR ADVANCED ECONOMIES (Per Cent) 2010-2014

UNEMPLOYMENT RATE (per cent)	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^e
Advanced Economies	8.3	7.9	8.0	7.9	7.3
United States of America	9.6	8.9	8.1	7.4	6.3
Japan	5.0	4.6	4.3	4.0	3.7
Euro Area	10.1	10.1	11.3	11.9	11.6
Germany	7.1	6.0	5.5	5.3	5.3
France	9.3	9.2	9.8	10.3	10.0
Italy	8.4	8.4	10.7	12.2	12.6
United Kingdom	7.9	8.1	8.0	7.6	6.3
Canada	8.0	7.4	7.3	7.1	7.0

r - revised

e - estimated

Source : IMF - WORLD ECONOMIC OUTLOOK, October 2014

10. The Bali Package, an outcome of the ninth WTO ministerial conference in December 2013, was the first multilateral trade agreement reached by all members of the WTO. It aims to reduce global trade barriers through focus on four main areas, namely, Trade Facilitation, Agriculture, Cotton and Development & Least Developed Countries.

Package as it required the consensus of all WTO members. An agreement was later reached, in November, between India and the USA paving the way for the adoption of the Trade Facilitation Agreement by the General Council of the WTO. Importantly, the agreement stipulates that WTO members would not challenge food stockholding programmes until a permanent agreement was agreed by the WTO.

Caribbean Community (CARICOM)

In accordance with its mandate to promote economic integration among its members, CARICOM Heads of Government at its thirty-fifth regular meeting approved the community's first strategic plan. The Caribbean Community Five-Year Strategic Plan 2015-2019: Repositioning CARICOM targets eight strategic priorities and identifies areas of intervention for each. The strategic priorities are: Building Economic Resilience; Social Resilience; Environmental Resilience; Technological Resilience; Strengthening the CARICOM Identity and Spirit of Community; Strengthening Community Governance along with Coordinated Foreign Policy; Research & Development; and Innovation.

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

CARICOM member states continued to implement the EPA with the EC. At the regional level, CARICOM participated in the first CARIFORUM-EU Joint Consultative Committee meeting. This committee, which comprises non-State actors from CARIFORUM and the EU, is one of five required to facilitate the implementation of the EPA and is geared towards engaging civil society in the implementation process of the EPA. This committee proposed that greater attention be placed on several areas to enhance the benefits for CARIFORUM states from the implementation of the EPA. Among these areas were capacity building, particularly in Technical Barriers to Trade, Sanitary and Phyto-Sanitary Standards; funds disbursement to support the EPA implementation; and greater emphasis on areas such as services and intellectual property rights.

The CARIFORUM/EU Trade and Development Committee, another of the five committees, met to appraise the first five years of the EPA. Among the recommendations arising from this meeting were the creation of subsidiaries to implement several EPA provisions; and the establishment of a task force to present to the joint CARIFORUM EU Council proposals addressing issues identified by the five-year review.

CARIFORUM/Canada

Negotiations continued for the establishment of a free trade and development agreement between CARICOM and Canada. During the year, both parties engaged in the fifth,

sixth and seventh rounds of negotiations at the end of which an Agreement in Principle was anticipated. The parties, however, failed to agree on several issues, thus failing to meet the deadline date for the completion of talks.

INTERNATIONAL COMMODITY MARKETS

The Energy Price Index of the World Bank recorded a 7.1 per cent decline, owing primarily to increased supply of oil from non-OPEC sources. The Non-Energy Commodity Price Index also decreased, down 4.6 per cent, reflecting in part lower prices for grains and fertilizers, which outweighed higher prices for beverages.

Crude oil prices averaged US\$96.20/barrel, the lowest recorded since 2010 when the average was US\$79.04/barrel (Table 1.4). For the first six months of 2014, prices trended upwards, moving from an average of US\$102.10/barrel in January to US\$108.37/barrel in June. This upward movement was influenced mainly by threats to supply, namely, geopolitical disturbances. Starting in July, prices consistently declined, ending the year at US\$60.70/barrel. Contributing to the declining trend were improved supply conditions and demand constraints as follows:

- Greater than anticipated supply – This was due, in part, to the increased production of crude oil in some non-OPEC producing countries using unconventional¹¹ methods. Specifically, the post-2009 rise in oil prices as well as the use of new extractive technologies increased the profitability of producing crude oil from shale rock formations in the USA and tar sands in Canada using methods such as hydraulic fracturing and horizontal drilling.
- Changes in OPEC policy – OPEC accounts for approximately 40.0 per cent of global crude oil output and has traditionally had the capacity to change prices through adjusting supply. Since 2010, OPEC has produced in line with maintaining a desired price range of US\$100/barrel–US\$110/barrel. On November 27, the cartel took a decision to maintain its combined output at 30 million barrels per day, despite the fall in prices. This was supported by the decision by Saudi Arabia, an OPEC member, to cut the price of its oil sold in the US and Asian markets. These actions signalled a shift in policy from focusing on a price band to maintaining market share.
- Easing of the impact of geopolitical tensions and political turmoil – In the latter half of 2014, it became obvious that conflicts in Iraq, Libya, Nigeria and in Eastern Europe were less threatening to supply than initially anticipated. These tensions in oil producing

11. Unconventional methods refer to the production and extraction of crude oil using techniques other than the traditional oil well method. Unconventional oil production is typically more costly than conventional oil production.

TABLE 1.4
SELECTED COMMODITY PRICE DATA, 2010 - 2014, US\$

Commodity	Price per unit	2010	2011	2012	2013	2014	% Change 2014/2013
Crude Oil (Average Spot)	\$/bbl	79.0	104.0	105.0	104.10	96.20	-7.6
Coffee, Arabica	\$/kg	4.32	5.98	4.11	3.08	4.42	43.5
Coffee, Robusta	\$/kg	1.74	2.41	2.27	2.08	2.22	6.7
Bananas, EU	\$/kg	1.00	1.12	1.10	1.02	1.04	2.0
Bananas, US	\$/kg	0.87	0.97	0.98	0.92	0.93	1.1
Oranges	\$/kg	1.03	0.89	0.87	0.97	0.78	-19.6
Sugar, US	\$/kg	0.79	0.84	0.64	0.45	0.53	17.8
Sugar, World	\$/kg	0.47	0.57	0.47	0.39	0.37	-5.1
Sugar, EU	\$/kg	0.44	0.45	0.42	0.43	0.43	0.0
Aluminium	\$/mt	2 173.00	2 401.00	2 023.00	1 847.00	1 867.00	1.1
Maize	\$/mt	185.90	291.70	298.40	259.40	192.90	-25.6
Sorghum	\$/mt	165.40	268.70	271.90	243.30	207.20	-14.8
Wheat, US HRW	\$/mt	223.60	316.30	313.20	312.20	284.90	-8.7
Phosphate Rock	\$/mt	123.00	184.90	185.90	148.10	110.20	-25.6
Potassium Chloride	\$/mt	331.90	435.30	459.00	379.20	297.20	-21.6
Urea	\$/mt	288.60	421.00	405.40	340.10	316.20	-7.0

Source: *The World Bank, Commodities Price Data, January 2015*

countries typically impact market expectations as they have the potential to disrupt output.

- Subdued demand – Slower than expected growth in some economies resulted in a downward adjustment in expectations. This weakening in growth prospects tempered the demand for crude oil.
- Appreciation of the US dollar – In the second half of the year, the US dollar appreciated against other major traded currencies. Because it is the currency in which most commodity transactions take place, this development resulted in an increase in the cost of oil, thus reducing demand.

With respect to non-energy commodities, Coffee prices increased relative to 2013. Drought conditions in Brazil, the world's largest coffee producer, led to a shortage of coffee berries on the market. As a result, the prices of coffee Arabica and Robusta reached US\$4.42/kg and US\$2.22/kg, respectively, increasing by 43.5 per cent and 6.7 per cent. Grain prices decreased amidst favourable weather conditions. The annual average prices for maize, sorghum and wheat (US HRW) fell by 25.6 per cent, 14.8 per cent, and 8.7 per cent respectively. The market for maize was well supplied owing to favourable growing conditions in the USA, the world's largest maize supplier. Wheat prices declined due to improved crop prospects in China, Central Asia, Australia and the EU.

TABLE 1.5
GLOBAL FOREIGN DIRECT INVESTMENT INFLOWS, 2012 - 2014, US\$Billion

	2012 ^r	2013 ^r	2014 ^e	% Change 2014/2013
World	1 324.0	1 363.0	1 260.0	-7.6
Developed Economies	590.0	594.0	511.0	-14.0
Europe	310.0	225.0	305.0	35.6
European Union	282.0	235.0	267.0	13.6
North America	213.0	302.0	139.0	-54.0
Developing Economies	650.0	677.0	704.0	4.0
Africa	55.0	56.0	55.0	-1.8
Latin America & the Caribbean	178.0	190.0	153.0	-19.5
Developing Asia	414.0	427.0	492.0	15.2
Transition Economies	84.0	92.0	45.0	-51.1

r - revised

e - estimated

Source: UNCTAD - Global Investment Trends Monitor, January 2015

The price of Aluminium averaged US\$1 867.00/mt relative to US\$1 847/mt during 2013. This reflected increased global demand and production cuts outside of China. The global fertilizer industry was impacted by lower crude oil prices, specifically, the increased use of unconventional crude oil production methods in the USA which resulted in lower natural gas prices, a key ingredient in the production of nitrogen-based fertilizers. During the year, several fertilizer companies moved their production plants to the USA, as they sought to benefit from the reduction in natural gas prices. As a consequence, the components of fertilizers—phosphate rock, potassium chloride, and urea—all recorded price reductions of 25.6 per cent, 21.6 per cent and 7.0 per cent, respectively.

INTERNATIONAL FINANCIAL MARKETS

Global Foreign Direct Investment (FDI) inflows decreased by 7.6 per cent to US\$1.3 trillion (Table 1.5). This decline was brought about by lower than expected global economic performance, policy uncertainty and geopolitical tensions, which combined, deterred investments. Lower FDI inflows reflected declines of 14.0 per cent to US\$511 billion to Developed Economies; and 51.1 per cent to US\$45.0 billion to Transition Economies. Developing Economies received US\$704 billion in FDI inflows, an increase of 4.0 per cent. Inflows to Developing Economies continued to surpass that received by Developed Economies, a trend which started in 2012. For 2014, FDI inflows to Developing Economies were some US\$193 billion greater than flows to Developed Economies.

Of the top five FDI recipients for 2014, China was the largest recipient, with inflows estimated at US\$128.0 billion. The other countries completing the top five were Hong Kong, USA, Singapore and Brazil.

Lower FDI inflows received by Developed Economies reflected mainly the decline to the USA to almost a third of 2013 levels due to a large divestment. FDI inflows to Europe increased by 35.6 per cent to US\$305.0 billion. Driven by reinvested earnings and cross border mergers & acquisitions, inflows to the UK increased. Also receiving increased inflows were Sweden, Portugal, Luxembourg and the Netherlands. Germany, France and Ireland, however, received lower inflows owing to divestments, repayment of loans to parent companies and changes to intra-company loans.

Flows to Developing Countries were driven by an increase to Developing Asia (15.0 per cent to US\$492.0 billion), as Africa and Latin America & the Caribbean recorded lower

levels. The increased inflows to Developing Asia resulted primarily from higher levels of flows to: China, reflecting increased flows to the service sector; Hong Kong (China) and Singapore, associated with these countries being leading regional business hubs housing the regional headquarters of several Asian transnational corporations; as well as Indonesia, Thailand and Myanmar.

The decline in flows to Africa (down 1.8 per cent to US\$55.0 billion) was due mainly to a fall-off experienced by North Africa as continued civil unrest in Libya constrained flows. This was partly countered by a rise in flows to Mozambique into the country's liquefied natural gas sector. Subsequent to four consecutive years of growth, FDI flows to Latin America declined to US\$153.0 billion during 2014. This fall-off was due to a decrease in cross border mergers & acquisitions and a decline in investments in the extractive industries, given the decline in commodity prices. Among the countries receiving less inflows were Mexico, Venezuela, Argentina and Brazil. Within Transition Economies, the decline in FDI inflows reflected, in part, sanctions imposed on businesses and individuals from the Russian Federation. Flows to the Russian Federation amounted to US\$19 billion, a decrease of 70.0 per cent.

OUTLOOK

Global economic activity is projected to increase by 3.5 per cent. The pace of growth in Advanced Economies is forecast to intensify at 2.4 per cent relative to an estimate of 1.8 per cent in 2014. In contrast, for Emerging Market & Developing Countries, growth is projected to slow by 0.1 percentage point to 4.3 per cent.

Commodity prices are expected to remain subdued during 2015. The average price of crude oil is expected to remain within a band of US\$50/barrel–US\$60/barrel. Prices will continue to be subdued by high output levels from North America and OPEC's indication that it will allow markets to determine the price. On the demand side, it is anticipated that consumption will weaken. Natural gas prices, which are linked to crude oil prices in some markets, are also expected to be low. The downward movement of natural gas prices will place downward pressures on fertilizer prices. For Agriculture items, it is anticipated that prices will continue to fall, given the improved crop prospects and low fertilizer prices. Metal prices are forecast to decline amidst increased supplies and low demand from China, which consumes approximately 45.0 per cent of global metal production. ■

OFFICIAL DEVELOPMENT ASSISTANCE



(L-r) Professor Winston Davidson, Board Chairman, Bureau of Standards (BSJ); Ambassador Paola Amadei, Delegation of the European Union, Jamaica; Mr Stephen Wedderburn, Chief Technical Director, Ministry of Investment & Commerce; and Director General, PIOJ, Mr Colin Bullock, exchange pleasantries during the hand-over of equipment to the Bureau of Standards Jamaica for the Economic Partnership Agreement (EPA) Capacity Building Project.

Photograph contributed by the Planning Institute of Jamaica

OFFICIAL DEVELOPMENT ASSISTANCE

INTRODUCTION

Official Development Assistance (ODA)¹ in the form of loans, grants and technical assistance from multilateral and bilateral sources, continued to support Government policies and strategies as outlined in the Medium Term Socio-Economic Policy Framework (MTF)², 2012–2015. ODA was aimed at the Government's underpinning strategy of promoting socio-economic stability and growth. New and ongoing projects funded with ODA, inclusive of counterpart contributions, amounted to US\$2.6 billion³ (\$289.2 billion)⁴, a 16.0 per cent decline compared with 2013. Disbursements totalled US\$476.1 million (\$53.0 billion), a reduction of US\$28.3 million (\$3.1 billion) compared with 2013.

Newly approved ODA from the Multilateral Financial Institutions (MFIs)⁵ totalled US\$472.3 million (\$52.5 billion), a 112.7 per cent increase compared with 2013. This was attributable to several new projects approved under the portfolio of the International Bank for Reconstruction and Development (IBRD) – (The World Bank). There was a 96.0 per cent and a 37.7 per cent decrease in new ODA approvals from Bilateral sources and Multilateral Technical Cooperation (MTC)⁶ agencies, totalling US\$14.0 million (\$1.6 billion) and US\$7.7 million (\$856.4 million), respectively. An amount of US\$21.8 million (\$2.4 billion) was approved from the Climate

Investment Funds (CIF), a multidonor trust fund dedicated to climate change financing and the Global Environment Facility (GEF).

New approvals from MFIs focused primarily on the Administrative and Social Infrastructure sectors. Assistance to the Administrative sector took the form of budget support which was provided mainly by the Inter-American Development Bank (IDB). This support assisted the government in financing social and economic programmes. Social Infrastructure support was derived mainly from the World Bank with assistance provided for Jamaica's social protection system and for community development.

New bilateral assistance was provided primarily for public financial management (PFM) to improve governance and financial prudence, including the development of a comprehensive Public Investment Management System (PIMS), as well as for the third phase of the Citizens' Security and Justice Programme III (CSJP III). There was a 96.0 per cent decline in approved ODA from bilateral sources, compared with 2013, which was mainly attributable to the approval of the Major Infrastructure Development Project (MIDP) in 2013. The financing of US\$300.0 million (\$33.4 billion) from China for the MIDP, substantially increased the level of new ODA for the bilateral portfolio in that year. Despite

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.
2. The MTF is the main mechanism for translating *Vision 2030 Jamaica* goals. It outlines a prioritized package of policies, strategies and programmes aligned to the budget at the macro level that will be implemented primarily by the Ministries, Departments and Agencies (MDAs)
3. Amounts are rounded to one decimal place.
4. The annual average exchange rate of US\$1 = J\$111.22 is used.
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. These are institutions created by a group of countries that support national development primarily through the provision of technical assistance. They include the Food and Agriculture Organization, International Atomic Energy Agency, Organization of American States, Pan American Health Organization, UNAIDS, United Nations Environmental Programme, United Nations Education, Scientific and Cultural Organization, United Nations Children's Fund, United Nations Development Programme, United Nations Population Fund, and the Global Fund to Fight Aids, Tuberculosis and Malaria.

the decrease in new bilateral resources, total disbursements amounted to US\$163.5 million (\$18.2 billion), an increase of 23.8 per cent in comparison with 2013.

Disbursements fell by 28.5 per cent, which totalled US\$10.1 million (\$1.1 billion), compared with the previous year. Nevertheless, MTC agencies directed new resources toward programmes designed to build human capital and attain social stability. Capacity building support was provided, inter alia to enhance the social protection system, and advance the Government's efforts at achieving social cohesion, as well as support the 2010 West Kingston Commission of Enquiry.

Country Strategies (CSs) with three Development Partners, viz: Caribbean Development Bank (CDB), European Union (EU) and the World Bank were approved during the period. The funding commitments under these strategies were as follows: CDB, US\$33.8 million (\$3.8 billion); EU, €46.0 million⁷ (\$6.7 billion); and World Bank, US\$510.0 million (\$56.7 billion).

Within the context of sustainable development, the Government has recognized the importance of prudent management of Jamaica's natural resources and the potential negative impact of climate change. The GoJ has sought therefore to collaborate with International Development Partners (IDPs) on interventions to improve the management of our natural resources, to build resilience and mitigate the effects of climate change. The development community

has also identified climate change as a focal area for ODA with the the new CSs of some of Jamaica's IDPs featuring interventions in this area. Due to its increasing importance to national development, Environment and Climate Change has been included as an area for purposes of tracking and reporting on ODA to Jamaica.

FINANCING

Loan and grant-funding for new and on-going projects and programmes totalled US\$2.4 billion (\$266.9 billion) of which, 53.9 per cent was from MFIs, 44.5 per cent from Bilateral partners, 0.9 per cent was from Environment & Climate Change Funds,⁸ and 0.6 per cent from MTC agencies (Figure 2A). Loans amounted to US\$1.8 billion (\$200.2 billion) and grants totalled US\$0.6 million (\$66.7 billion).

New ODA⁹

New ODA totalled US\$515.8 million (\$57.4 billion) of which loan resources accounted for US\$404.0 million (\$44.9 billion), a decrease of 14.9 per cent compared with 2013. Total grant resources amounted to US\$111.8 million (\$12.4 billion) (Figure 2B and Table 2.1).

New loan commitments from MFIs amounted to US\$394.0 million (\$43.8 billion). Of the total new loans from the MFIs, the World Bank accounted for US\$199.0 million (\$22.1 billion), an increase of US\$69.0 million (\$7.7 billion); IDB's contribution was US\$160.0 million (\$17.8 billion), an

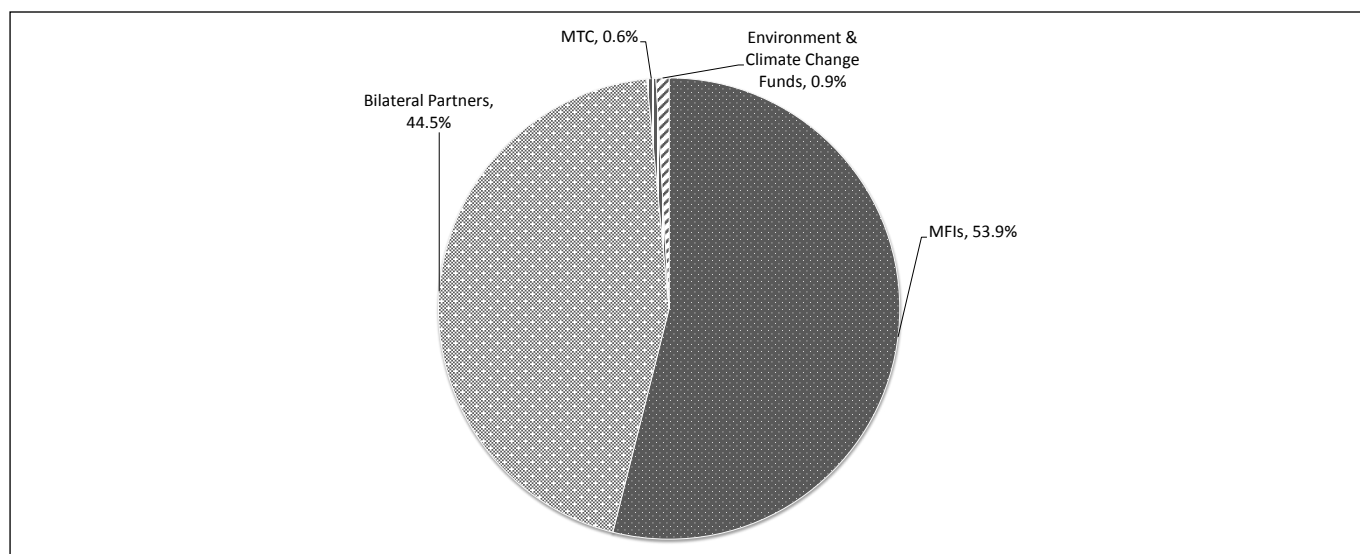


FIGURE 2A: NEW & ONGOING ODA

7. This amount is equivalent to US\$60.2 million

8. New Source of funding with contributions from Multilateral and Bilateral sources – CIF & GEF

9. New ODA refers to agreements for concessional loans, grants and technical assistance which were approved in 2014

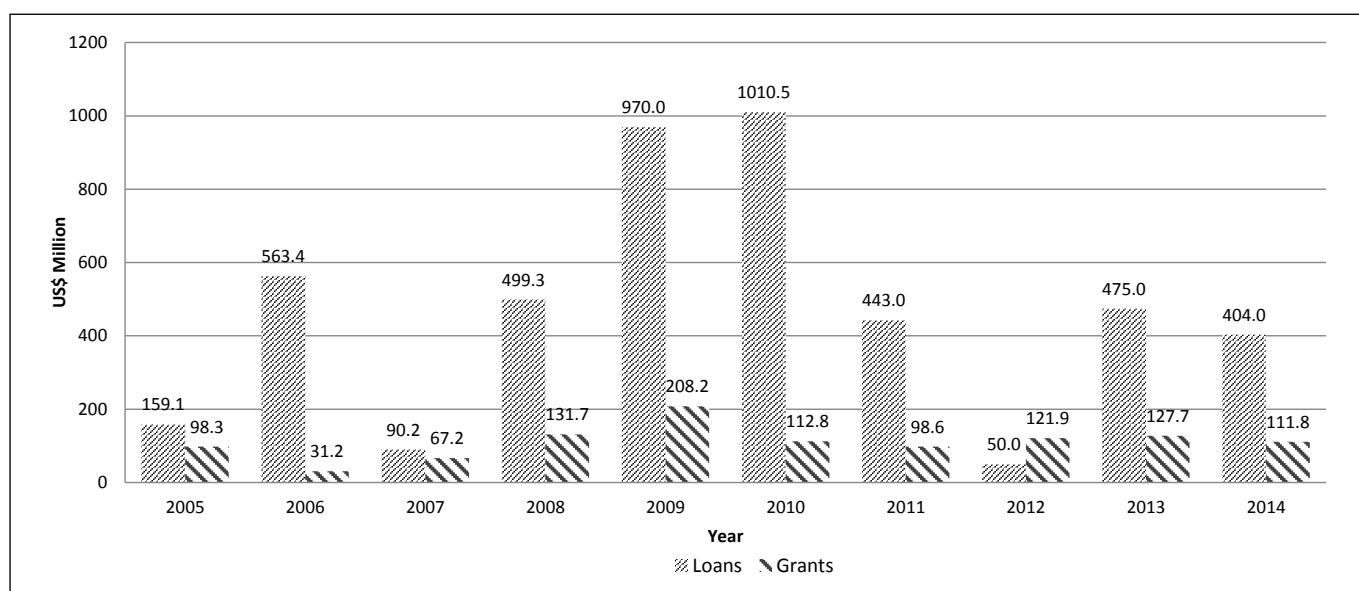


FIGURE 2B: NEW LOANS AND GRANTS

increase of US\$146.0 million (\$16.2 billion); and the CDB provided US\$35.0 million (\$3.9 billion), an increase of US\$15.0 million (\$1.7 billion) compared with 2013 (Table 2.2). In addition, US\$10.0 million (\$1.1 billion) was approved by the Adaptation Programme and Financing Mechanism for the Pilot Programme for Climate Resilience (PPCR)¹⁰, which will be administered by the IDB on behalf of the CIF. The CIF is a multi-donor trust fund that provides resources to mitigate and manage the challenges of climate change and reduce their greenhouse gas emissions¹¹.

New grant resources from the IDPs decreased by 12.5 per cent to US\$111.8 million (\$12.4 billion). This decline was mainly as a result of the 75.5 per cent reduction in grant resources from bilateral partners. Despite the overall decrease in new grant resources, the EU approved resources totalling US\$75.1 million (\$8.4 billion)¹², an increase of US\$24.7 million (\$2.7 billion) compared with 2013. With respect to the MTCs, grant resources reflected a decrease of US\$4.7 million (\$522.7 million), in comparison with the previous year (see Table 2.2). Additionally, US\$11.8 million (\$1.3 billion) in grant resources was approved by the CIF and GEF.

**TABLE 2.1
SOURCES OF NEW OFFICIAL DEVELOPMENT ASSISTANCE, 2010-2014**

	2010			2011			2012			2013			2014		
	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total	Loans	Grants	Total
Bilateral	160.5	47.6	208.1	0.0	52.8	52.8	0.0	37.5	37.5	311.0	57.2	368.2	0.0	14.0	14.0
Multilateral Financial	850.0	53.0	903.0	443.0	41.6	484.6	50.0	73.3	123.3	164.0	58.1	222.1	394.0	78.3	472.3
Multilateral Technical	0.0	12.2	12.2	0.0	4.2	4.2	11.2	11.9	23.1	0.0	12.4	12.4	0.0	7.7	7.7
Environment & Climate Change Funds													10.0	11.8	21.8
Total	1 010.5	112.81	123.3	443.0	98.6	541.6	50.0	121.9	171.9	475.0	127.7	602.7	404.0	111.8	515.8

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

10. The Programme is aimed at increasing Jamaica's resilience to climate change by enhancing the adaptive capacity of the agriculture and tourism sectors and will facilitate the mainstreaming of climate change issues into development planning.

11. Climate Investment Funds website at <https://www.climateinvestmentfunds.org/cif/node/11900>

12. This amount is equivalent to €56.9 million

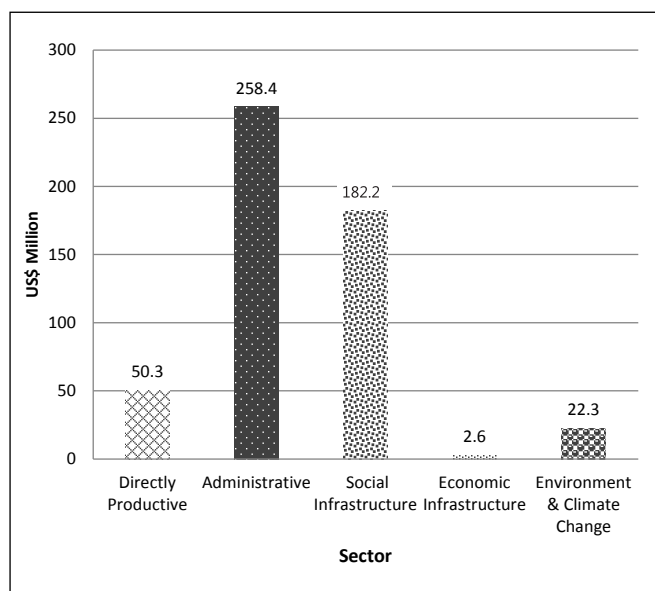


FIGURE 2C: SECTORAL ALLOCATION OF NEW ODA

SECTOR ALLOCATION¹³ OF NEW ODA

The sectoral allocation of new loans and grants from IDPs was as follows: Administrative, US\$258.4 million (\$28.7 billion); Social Infrastructure, US\$182.2 million (\$20.3 billion); Directly Productive, US\$50.3 million (\$5.6 billion); and Economic Infrastructure sectors, US\$2.6 million (\$289.2 million) (Figure 2C). Environment and Climate Change was allocated US\$22.3 million (\$2.5 billion). MFIs support for the Administrative sector was US\$253.3 million (\$28.2 billion), primarily through budget support which represented 70.0 per cent of the Administrative allocation. Bilateral resources focused on activities within the Social Infrastructure, Administrative and Economic Infrastructure sectors, while MTC funding targeted the Social Infrastructure and Directly Productive sectors (see Table 2.2).

Total Disbursements

Total disbursements on new and ongoing projects were US\$476.1 million (\$53.0 billion), a decrease of 5.6 per cent compared with 2013, with loans accounting for US\$352.6 million (\$39.2 billion) and grants US\$123.5 million (\$13.7 billion). Disbursements were as follows:

- Bilateral sources – US\$121.8 million (\$13.5 billion) in loans and US\$41.7 million (\$4.6 billion) in grants

- MFIs – US\$230.8 million (\$25.7 billion) in loans and US\$71.7 million (\$ 8.0 billion) in grants
- MTC agencies – grants of US\$10.1 million (\$1.1 billion) (see Table 2.2).

NET FLOWS

Net flows¹⁴ between Jamaica and its three main multilateral lending partners, namely: IDB, CDB and IBRD, and China, were in the amount of US\$108.0 million (\$12.0 billion) compared with US\$143.8 million (\$16.0 billion) in 2013 (Table 2.3). The decrease in the net flow position resulted from a 15.5 per cent reduction in disbursements from the MFIs. Disbursements totalled US\$298.6 million (\$33.2 billion), while total repayment of principal, interest and other charges decreased to US\$188.7 million (\$21.0 billion) in comparison with the previous year.

MULTILATERAL FINANCING

Caribbean Development Bank (CDB)

Eight projects were supported by resources of US\$160.4 million (\$17.8 billion) under the cooperation programme with the Caribbean Development Bank (CDB). The portfolio consisted of five projects with loan financing totalling US\$121.9 million (\$13.6 billion), and three grants amounting to US\$11.9 million (\$1.3 billion). Counterpart contribution totalled US\$26.6 million (\$3.0 billion), representing US\$24.6 million (\$2.7 billion) for loan projects and US\$2.0 million (\$22.4 million) for grant funded projects. The sectoral distribution of the loan-financed projects was Social Infrastructure, US\$45.8 million (\$5.1 billion); Economic Infrastructure, US\$41.1 million (\$4.6 billion); and Administrative, US\$35.0 million (\$3.9 billion). The sectoral distribution of the grant-funded projects was Social Infrastructure, US\$11.7 million (\$1.3 billion); and Administrative, US\$175 000 (\$19.5 million). Disbursements totalled US\$38.3 million (\$4.3 billion), a decrease of US\$1.7 million (\$189.1 million) compared with 2013, despite the approval of US\$35.0 million (\$3.9 billion) in budget support, of which US\$25.0 million (\$2.8 billion) representing the first tranche was released.

The new Country Strategy Paper (2014–2016) with funding of US\$33.8 million (\$3.8 billion) was approved. The financing envelope was subsequently increased to US\$35.0 million (\$3.9 billion) to support a policy-based loan—the Fiscal Consolidation Growth and Social Stability. The loan was aimed at supporting key areas of fiscal and

13. Administrative – Public Sector Reform, Budgetary Support, Governance
 Social Infrastructure – Health, Education, Housing, Social Safety Net
 Directly Productive- Agriculture, Tourism, Mining, MSME
 Environment & Climate Change – Natural Resource Management, Ecosystem Preservation, Disaster Risk Management Reduction
 Economic Infrastructure – Transport, Power, Water, Sewerage

14. Net Flow equals Total Disbursements less Total Repayments

TABLE 2.2
SUMMARY OF 2014 OFFICIAL DEVELOPMENT ASSISTANCE
(US\$ MILLION)

International Development Partners	New ODA			Sectors for New ODA					Disbursements (New & On-going ODA)		
	Loan	Grant	Total	Directly Productive	Administrative	Social Infra-structure	Economic Infra-structure	Environment & Climate Change	Loan	Grant	Total
MFI											
CDB	35.0		35.0		35.0				25.0		25.0
EU		75.1	75.1		42.0	33.1				68.7	68.7
IDB	160.0	3.2	163.2		141.4	21.3	0.5		194.8	3.0	197.8
IBRD	199.0		199.0	50.0	35.0	114.0			11.0		11.0
Sub-Total	394.0	78.3	472.3	50.0	253.4	168.4	0.5	0.0	230.8	71.7	302.5
BILATERAL											
Brazil										0.2	0.2
Canada									13.8		13.8
People's Republic of China									121.8		121.8
India		2.1	2.1				2.1			2.1	2.1
Japan		2.1	2.1		2.1					1.4	1.4
Spain											
South Korea										0.8	0.8
United Kingdom		2.6	2.6		2.6					4.1	4.1
United States of America		1.9	1.9			1.9				14.0	14.0
Scholarships		5.3	5.3			5.3				5.3	5.3
Sub-Total		14.0	14.0		4.7	7.2	2.1		121.8	41.7	163.5
MTC											
CFTC		0.3	0.3		0.3					0.3	0.3
FAO		0.2	0.2	0.2						0.1	0.1
GEF SGP		0.5	0.5	0.1		0.4				0.4	0.4
Global Fund		3.6	3.6			3.6				2.7	2.7
IAEA		0.9	0.9			0.9				0.1	0.1
OAS		0.1	0.1			0.1				0.3	0.3
PAHO		0.4	0.4					0.4		0.2	0.2
UNAIDS		0.1	0.1			0.1				0.04	0.04
UNDP		0.4	0.4			0.3		0.1		1.9	1.9
UNESCO		0.1	0.1			0.1				1.8	1.8
UNICEF		0.6	0.6			0.6				1.8	1.8
Scholarships		0.5	0.5			0.5				0.5	0.5
Sub-Total		7.7	7.7	0.3	0.3	6.6	0.0	0.5		10.1	10.1
Environment & Climate Change Funds											
Climate Investment Funds	10.0	7.9	17.9					17.9			
GEF		3.9	3.9					3.9			
Sub-Total	10.0	11.8	21.8					21.8			
TOTAL	404.0	111.8	515.8	50.3	258.4	182.2	2.6	22.3	352.6	123.5	476.1

Source: Planning Institute of Jamaica and International Development Partners

debt sustainability, increasing economic growth through competitiveness and protecting vulnerable groups.

Three projects with loan financing totalling US\$53.8 million (\$6.0 billion) were completed:

- The *Tropical Storm Nicole Rehabilitation Works* (2011–2014) for US\$29.0 million (\$3.2 billion) supported the repair of 19 sections of the Sandy Gully drainage system which were badly damaged during the passage of Tropical Storm Nicole in 2010. The rehabilitation works were aimed at reducing the

flood risk of the Kingston Metropolitan Area through rehabilitation, restoration and protection of critical sections of physical infrastructure in the shortest time, based on least-cost solutions.

- The *Second Student Loan* (2013–2014) of US\$20.0 million (\$2.2 billion) provided resources to assist with funding of loans to tertiary level students through the Student Loan Scheme. The Basic Needs Trust Fund (Sixth Programme) (2009–2014) with grant resources of US\$4.8 million (\$533.9 million) was geared towards expanding and conserving the stock

TABLE 2.3
2014 NET FLOWS
(US\$ MILLION)

	IDB	CDB	IBRD	CHINA	2013 TOTAL	2014 TOTAL
Loan Disbursements	193.6	37.8	11	56.2	365.9	298.6
DEBT SERVICING:	79.5	36.9	45.7	26.6	222.1	188.7
Repayments (Principal)	59	24.2	36.4	13.5	163	133.1
Interest and Charges	20.5	12.7	9.3	15.1	59.1	57.6
Net Flow	114.1	0.9	-34.6	27.6	143.8	108

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

of basic infrastructure; enabling access to a wider range of basic public services; improving the human resource base through skills development and social readjustment; and promoting and strengthening community organizations and their capacity for initiating and managing change.

Achievements under the programme included:

- the construction and upgrading of six water supply systems in St. Ann, St. Thomas, Portland and Manchester
- the expansion and rehabilitation of five primary and infant schools in St. Elizabeth, Clarendon and Manchester, as well as the construction of one basic school in St. Andrew
- the rehabilitation of the Mavis Bank Health Centre, St. Andrew
- the rehabilitation of the Brandon Hill to Belair bridge and road, St. Andrew
- the reconstruction of the Rocky Point Market, Clarendon
- the rehabilitation and equipping of the music facility and the provision of business development and marketing training to the Alpha Boys Home, St. Andrew
- the provision of capacity building training to maintain newly constructed and rehabilitated facilities
- crop diversification training to Brandon Hill/ Belair Jamaica Agricultural Society, St. Andrew.

EUROPEAN UNION (EU)

The cooperation programme with the European Union¹⁵ consisted of 16 programmes and projects totalling €242.3 million (\$35.5 billion¹⁶). All programmes and projects were funded from the European Development Fund (EDF) with the exception of the Sugar Transformation and Banana Programmes which were funded by the General Budget of the EU. The EU contribution amounted to €239.4 million (\$35.1 billion) in grant resources and Government counterpart funding totalled €2.9 million (\$425.4 million). The sectoral distribution of grant resources provided by the EU was Administrative, €170.4 million (\$25.0 billion), Social Infrastructure, €58.5 million (\$8.6 billion) and Directly Productive €10.5 million (\$1.5 billion).

Disbursements of €52.1 million (\$7.6 billion) represented an increase of 9.9 per cent compared with 2013. Of the total disbursed, €32.2 million (\$4.7 billion) was for budget support, of which 73.6 per cent supported the Government's Sugar Transformation Programme. Under the EDF programme, which contributed the remaining €19.9 million (\$2.9 billion) of total programme disbursement, 55.4 per cent was linked to the Poverty Reduction Programme.

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 €100 000 (\$14.7 million) was disbursed to these organizations in Jamaica.

The 11th EDF National Indicative Programme (NIP) was officially signed between the GoJ and the European Commission. The programme's total budget is €46.0 million (\$6.7 billion) for the period 2014 - 2020. The focal sectors are Justice, Environment and Climate Change, and Public Finance Management.

15. The European Union remains Jamaica's largest provider of grant resources.

16. Exchange rate: €1.00:J\$146.69

Four Financing Agreements and one addendum were signed for a total of €64.9 million (\$9.5 billion). The agreements were:

- ***Accompanying Measures for Sugar (AMS) Protocol 2013*** for €29.8 million (\$4.4 billion) – to assist the Government of Jamaica to reduce poverty and improve the living standards of the rural population in sugar dependent areas
- ***Justice, Security, Accountability and Transparency (JSAT) Project*** for €12.6 million (\$1.8 billion) – to improve the standard of living and quality of life of Jamaican citizens by strengthening governance and oversight, with particular regard to the functioning of the security and justice systems
- ***Poverty Reduction Programme IV (PRP IV)*** for €12.5 million (\$1.8 billion) – to empower residents of volatile communities, to achieve their fullest potential and contribute to the attainment of a secure, cohesive and just Jamaican society as outlined in Goals 1 and 2 of *Vision 2030 Jamaica - National Development Plan*
- ***Technical Cooperation Facility V (TCF V)*** for €2.3 million (\$337.4 million) – to provide technical assistance to support the implementation of the EU financed programmes
- ***An addendum to the Debt Reduction and Growth Enhancement Programme*** for the amount of €8.0 million (\$1.2 billion), increasing the total funding of the Programme to €64.9 million (\$9.5 billion). The purpose of the Programme is to contribute to improving the welfare of the Jamaican people by reducing public debt stock and removing public governance obstacles to economic growth.

The Institutional Strengthening to the Planning Institute of Jamaica (ISNAO¹⁷) II (2007-2014) ended. The ISNAO II was implemented for a total of €1.0 million (\$146.7 million). The overall objective of the project was to reinforce efficacy, efficiency and impact of the Government of Jamaica's policies on poverty. Some of the main achievements were:

- the procurement of long term technical consultants to aid in the implementation and oversight of EU funded projects
- the procurement of equipment to improve the capacity of the office of the NAO
- the training of government officials in EU procurement and financial procedures, capacity-building on issues related to trade, environment, public financial management and other cross cutting themes.

INTER-AMERICAN DEVELOPMENT BANK (IDB)

The cooperation programme with the IDB totalled US\$548.1 million (\$61.0 billion), comprising loan financing of US\$537.0 million (\$59.7 billion) that supported 14 projects, and grants of US\$11.1 million (\$1.2 billion). The Portfolio also consisted of loans and grants totalling US\$ 78.8 million (\$8.8 billion) which were administered, by IDB on behalf of IDPs.

Loan financing from the IDB supported the following sectors: Economic Infrastructure US\$213.0 million (\$23.7 billion); Social Infrastructure, US\$90.0 million (\$10.0 billion); Administrative, US\$219.0 million (\$24.4 billion); and Directly Productive, US\$15.0 million (\$1.7 billion). Grant financing supported the following sectors: Economic Infrastructure, US\$7.5 million (\$834.2 million); Social Infrastructure, US\$2.5 million (\$278.1 million) and Administrative, US\$1.1 million (\$122.3 million).

Disbursements totalled US\$197.8 million (\$22.0 billion), an increase of US\$93.5 million (\$10.4 billion) compared with 2013. There was an overall increase in disbursements which stemmed from budget support financing of US\$140.0 million (\$15.6 billion), as well as increased disbursements from investment loans, which totalled US\$54.8 million (\$6.1 billion). Grant disbursements amounted to US\$3.0 million (\$333.7 million).

Loan financing totalling US\$160.0 million (\$17.8 billion) was approved to support three new programmes. This included two budget support programmes amounting to US\$140.0 million (\$15.6 billion), and US\$20.0 million (\$2.2 billion) for a third phase of the CSJP. A total of US\$10.0 million (\$1.1 billion) was also approved to support the Adaptation Programme and Financing Mechanism for the PPCR Programme, to be administered on behalf of the CIF.

New grant-financing totalling US\$51.5 million (\$5.7 billion) was approved. An amount of US\$3.2 million (\$355.9 million) was approved by the IDB for grant-financed projects. The new grant resources included administered financing of US\$48.3 million (\$5.4 billion), comprising US\$18.4 million (\$2.0 billion) and US\$16.7 million (\$1.9 billion) to support CSJP III, being administered on behalf of Department of Foreign Affairs Trade and Development (DFATD) and Department for International Development (DFID), respectively. In addition, US\$7.9 million (\$867.5 million) and US\$3.9 million (\$433.8 million) were approved in grant resources by the CIF and GEF for PPCR and the Integrated Management of the Yalaha-Hope Watershed Management Area Project, respectively.

Ten projects ended, nine of which were grant-financed. The Public Financial and Performance Management Programme III, which was financed with a loan of US\$60 million (\$6.7

17. The Planning Institute of Jamaica is the Office of the National Authorizing Officer

billion) provided budget support financing to facilitate public financial management and fiscal reforms.

Among the projects which ended were:

- **Support to Promote Energy, Efficiency, Energy Conservation and Sustainable Energy** with resources of US\$579 958 (\$64.5 million) which provided assistance to the DBJ Energy Fund to promote energy efficiency measures in small and medium-sized enterprises
- **Micro franchise as a Tool for Economic Promotion of at Risk Youth** with approved funds of US\$117 181 (\$13.0 million) developed a micro franchise business model for youth at risk in poor inner city communities
- **Study of Adolescent Dislocation in Jamaica** had approved funds of US\$120 312 (\$13.4 million) and provided policy recommendations that supported adolescents' school needs by identifying and analyzing the social, economic and structural factors that contribute to dropout in secondary schools. It also assessed the socio-economic impact of these factors in at risk youth schooling needs
- **Support the Design of Decentralized Road Maintenance** with resources of US\$420 479 (\$46.8 million), provided support to the National Works Agency for road safety and performance based road maintenance. The project accomplished a road condition survey, design and implementation of a road emergency attention system; consultancy services for the establishment of the Land Transport Authority; and training of community-based workforce
- **Developing Design Concepts for Climate Change Resilient Buildings** amounted to US\$367 258 (\$40.8 million) and assessed climate change related risks and increase resilience to climate change in the buildings of Jamaica
- **Project to Improve Livelihoods in the Portmore Causeway Fishing Village** had US\$245 000 (\$27.2 million) in resources and supported the improvement of the livelihoods in the Portmore Causeway Fishing Village.

The two-year Country Strategy (CS) 2013–2014 ended. The focal areas were Fiscal Sustainability; Social Protection and Safety; Financial Sector and Business Climate; and Disaster Risk Management and Climate Change Adaptation.

INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT (IBRD) – THE WORLD BANK

The cooperation programme with the World Bank comprised 10 projects and was funded by a total of US\$360.5 million (\$40.1 billion), including loan resources of US\$285.0 million (\$31.7 billion) and counterpart contribution totalling

US\$75.5 million (\$8.4 billion). The World Bank also administered six grants with total financing of US\$10.6 million (\$1.2 billion), of which US\$125 000 (\$13.9 billion) was attributed to counterpart funding, as follows:

- two projects amounting to US\$5.3 million (\$589.5 million) from the Japanese Trust Fund
- two projects from the UK's Department for International Development (DFID) Trust Fund for US\$4.5 million (\$500.5 million)
- one project from the Trust Fund for Statistical Capacity Building with resources of US\$400 000 (\$44.5 million)
- one project funded by US\$300 000 (\$33.4 million) from the Strategic Climate Fund.

The sectoral distribution of the loan financing was Economic Infrastructure, US\$15.0 million (\$1.7 billion); Directly Productive, US\$65.0 million (\$7.2 billion); Administrative, US\$35.0 million (\$3.9 billion); and Social Infrastructure, US\$170.0 million (\$18.9 billion). Total disbursement under the portfolio was US\$11.0 million (\$1.2 billion), a US\$146.3 million (\$16.3 billion) decrease compared with 2013. This decrease is directly attributable to the fact that no budget support was approved in 2014, in contrast to 2013 when an amount of US\$130.0 million (\$14.5 billion) was disbursed under the Economic Stabilization and Foundations for Growth Development Policy Loan. In addition, six of the 10 projects in the portfolio were in the initial stage of implementation, given that they were approved during the year.

The six new loans approved totalled US\$199.0 million (\$22.1 billion) to finance the implementation of the following projects:

- The **Integrated Community Development Project** for US\$42.0 million (\$4.7 billion) is to be implemented over six years and is aimed at enhancing access to basic urban infrastructure and services while contributing towards increased community safety in 18 economically vulnerable and socially volatile inner city communities
- The **Foundations for Competitiveness and Growth Project** with funding of US\$50.0 million (\$5.6 billion) and an implementation period of six years will support efforts to strengthen Jamaica's business environment for private sector investment
- The **Strategic Public Sector Transformation Programme** supported by funding of US\$35.0 million (\$3.9 billion) to be implemented over five years is aimed at strengthening public resource management, as well as supporting selected public sector institutions to promote a more enabling environment for private sector growth

- The *Youth Employment in Digital and Animation Industries Project*, funded by US\$20.0 million (\$2.2 billion) is to be implemented over five years, to support youth employment in the digital and animation industries in Jamaica
- Additional Financing of US\$40.0 million (\$4.4 billion) was provided for another four years to fund the *Social Protection Project* which is geared towards further strengthening of Jamaica's social protection system
- Additional Financing of US\$12.0 million (\$1.3 billion) was also approved to continue the funding to the *Early Childhood Development Project* for a further five years in order to support improvement in parenting programmes, and the monitoring of children's development, as well as the enhancement of the quality of these early childhood facilities.

The Country Partnership Strategy (CPS) (2014–2017) with funding of US\$510.0 million (\$56.7 billion) was approved, of which US\$255.0 million (\$28.4 billion) was allocated to finance investment projects; the balance of US\$255.0 million (\$28.4 billion) was for budget support. The overarching goal of the CPS is to support Jamaica in creating conditions for sustainable and inclusive growth. The CPS focuses on three key areas—Public Sector Modernization, Enabling Environment for Private Sector Growth, and Social and Climate Resilience.

BILATERAL COOPERATION¹⁸

The *Federative Republic of Brazil* disbursed US\$159 084 (\$17.7 million) from grant assistance of US\$4.4 million (\$489.4 million) allocated to the project for the establishment of a Centre for Professional Training at the HEART Trust/NTA Portmore facility. Disbursements supported the procurement of machines, tools and furniture.

The Government of *Canada*, through the Department of Foreign Affairs Trade and Development (DFATD)¹⁹, provided funding of C\$67.4 million (\$6.8 billion²⁰) for 24 projects. The bilateral portfolio, which comprised four projects, amounted to C\$45.6 million (\$4.6 billion) while Jamaica was allocated C\$21.8 million (\$2.2 billion) for 20 projects under the regional programme. Sectoral distribution was as follows: Administrative, C\$33.6 million (\$3.4 billion); Social Infrastructure, C\$29.8 million (\$3.0 billion); and Directly Productive, C\$4.0 million (\$403.7 million). Disbursements

to bilateral projects totalled C\$12.3 million (\$1.2 billion), an increase of C\$10.5 million (\$1.1 billion) compared with 2013. This is partially attributable to disbursements of C\$2.8 million (\$282.6 million) to the PFM Project and C\$5.0 million (\$504.7 million) for the recently signed CSJP III to be administered by the IDB. Disbursements to national projects from the regional programme amounted to C\$3.3 million (\$333.1 million), a decrease of C\$400 000 (\$40.4 million) compared with 2013.

Jamaica will benefit from a newly approved regional project, Improved Access to Justice in the Caribbean. The project is aimed at developing model laws, legislative drafting and training, improving the accountability framework for the legal profession, and improving the skills of Alternative Dispute Resolution practitioners.

Assistance from the *People's Republic of China (PRC)* supported 12 projects amounting to US\$978.4 million (\$108.8 billion). This comprised loan financing of US\$822.2 million (\$91.4 billion), grant assistance amounting to US\$42.3 million (\$4.7 billion) and counterpart resources of US\$113.9 million (\$12.7 billion).

The PRC continued its traditional support to the Economic Infrastructure sector, which was allocated US\$674.5 million (\$75.0 billion) while the Social Infrastructure and Directly Productive sectors were allocated US\$87.0 million (\$9.7 billion) and US\$103.0 million (\$11.5 billion), respectively. Approximately US\$121.8 million (\$13.5 billion) was disbursed, an increase of US\$27.5 million (\$3.1 billion) compared with 2013. This was attributed to increased expenditure under the *Economical Housing Project*²¹.

The *Government of India* approved and disbursed US\$2.1 million (\$233.6 million) in grant resources to assist with the procurement and installation of floodlights at the Sabina Park cricket ground. This assistance allows for improved commercial viability and the extension of playing and viewing hours.

The *Government of Japan* through the Japan International Co-operation Agency (JICA) provided US\$6.3 million (\$700.7 million) in development assistance. This comprised US\$0.8 million (\$89.0 million) in technical assistance and grants of US\$5.5 million (\$611.7 million) provided through Trust Funds administered by the World Bank and the IDB. Sectoral allocation was as follows: Social Infrastructure, US\$3.6 million (\$400.4 million); Environment and Climate Change, US\$2.4 million (\$266.9 million); and Administrative,

18. This section reports on country to country assistance as well as assistance Jamaica receives under Caribbean regional Programmes

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

20. Exchange rate: C\$1.00 : J\$100.93

21. See Construction Chapter

US\$300 000 (\$33.4 million). Disbursements for the portfolio totalled US\$1.4 million (\$155.7 million) a decrease of US\$0.7 million (\$77.9 million) compared with 2013.

Under the Grassroots Human Security Grant Programme, support was approved for the following:

- Rejuvenation of West Indian Sea Island Cotton Industry in the parishes of St. Mary and St. Catherine (2014–2015), US\$ 106 631 (\$11.9 million) to purchase farming equipment to boost production
- Low Vision Resource Centre (2014–2015), US\$104 322 (\$11.6 million) to construct a centre at the Jamaica Society for the Blind in Kingston that will be used to provide eye care services
- Construction of Alexandria Public Library, St. Ann (2014–2015), US\$58 812 (\$6.5 million) to assist in the rebuilding of the library that was destroyed by fire
- Improvement of Emergency Response in the parish of Westmoreland (2014–2015), US\$81 010 million (\$9.0 million) to equip two ambulances and two fire trucks
- Improvement of facilities at Wait-A-Bit All Age School, Trelawny (2014–2015), US\$104 883 (\$11.7 million) to support the construction of a computer room, repair a multi-purpose court and replace the perimeter fence
- Crooked River Skills Training Centre, Clarendon (2014–2015), US\$100 803 (\$11.2 million) to construct a skills training centre
- Bustamante Hospital for Children, Kingston (2014–2015), US\$117 176 (\$13.0 million) to help with the procurement of medical equipment
- Improvement of the Firefighting Services of the Jamaica Fire Brigade, islandwide (2014–2015), US\$121 622 (\$13.5 million) to purchase a heavy duty vehicle, Global Positioning Systems equipment and replacement parts for fire hydrants.

The government of the **Republic of Korea** committed US\$4.8 million (\$533.9 million) in grant resources, allocated as follows: US\$2.1 million (\$233.6 million) for project support and US\$2.7 million (\$300.3 million) for Trust Funds administered by the IDB. The sectoral distribution was Economic Infrastructure, US\$2.1 million (\$233.6 million); Administrative, US\$2.0 million (\$222.4 million); and Social Infrastructure, US\$0.7 million (\$77.9 million). Disbursements for the portfolio amounted to US\$0.8 million (\$89.0 million), a decrease of US\$1.9 million (\$211.3 million) compared with 2013.

The following projects supported through Trust Funds ended:

- Support for the Privatization of the Norman Manley International Airport (NMIA) (2011–2014), US\$0.6 million (\$66.7 million). Technical consultants were engaged to undertake due diligence reports for the GoJ in order to divest the NMIA and selected aerodromes
- Design of an Integrated Operating Control Centre for City Management in Montego Bay (2013–2014), US\$250 000 (\$27.8 million). The consultant conducted a design and feasibility study for the initiative.

The *Cadastral Mapping and Land Registration Project* (2012–2014) for US\$2.1 million (\$233.6 million) ended. Under the project, a total of 1 008 parcels of land were surveyed with 212 titles presented to residents of selected land settlement schemes in the parishes of St. Mary, Portland, and St. Ann. One hundred and twenty persons from Ministries, Department and Agencies received training in several areas including Land Management and Policy, Cadastral Surveying, Cadastral Mapping and Registration.

The government of the **Kingdom of Spain** disbursed US\$16 579 (\$1.8 million) from grant resources of US\$178 579 (\$19.9 million) which were provided through Trust Funds administered by IDB for the Expanding Access to Financial Services for Rural Microenterprises project. The project, which ended this year, trained 312 farmers in farm management techniques including crop scheduling and record keeping. In addition, 2 149 persons accessed loans from Micro Credit Limited.

The cooperation programme with the **United Kingdom** comprised grants to seven bilateral projects totalling £31.9 million (\$5.8 billion²²), support from eight regional projects, debt relief of £3.8 million (\$696.1 million) and Trust Funds amounting to £1.9 million (\$348.0 million). The sectors supported were Social Infrastructure, £10.0 million (\$1.8 billion); and Administrative, £21.9 million (\$4.0 billion). Disbursements totalled £2.5 million (\$457.9 million) of which £600 000 (\$109.9 million) was from Trust Funds.

A grant of £10.0 million (\$1.8 billion) was approved for the CSJP III. The project, co-financed with IDB and DFATD, is a multifaceted crime and violence prevention intervention focused on building community safety and security in volatile and vulnerable communities.

New assistance of £1.6 million (\$293.1 million) was provided through the DFID Trust Fund to support the Strategic Public Sector Transformation Project. The project, implemented by the World Bank, is aimed at strengthening

public resource management and promoting a more enabling environment for private sector growth.

The following projects ended:

- The *Jamaica Reducing Re-offending Action Plan (JRRAP)* (2008–2014) with resources of £4.4 million (\$806.0 million) provided reintegration services to approximately 9 000 deported migrants. The project, implemented in Kingston, Portland, and St. James included training in building and construction, agriculture, entrepreneurial skills as well as proposal writing
- Strategic Statistical Development (2012–2014) with resources of £210 393 (\$38.5 million), funded by the UK Trust Fund administered by the World Bank, supported the strengthening of the institutional capacity of the Statistical Institute (STATIN) and national statistical system by improving financial and technical input
- The Commonwealth Debt Initiative (1998–2014) under which GOJ was granted debt relief. See Box 2.1 for additional information on the Initiative.

The cooperation programme with the **United States of America**, executed through the United States Agency for International Development (USAID), comprised grants to 16 projects totalling US\$60.4 million (\$6.7 billion). The sectoral distribution was as follows: Directly Productive, US\$9.5 million (\$1.1 billion); Social Infrastructure, US\$39.4 million (\$4.4 billion) and Environment & Climate Change, US\$11.5 million (\$1.3 billion). Disbursements totalled US\$14.0 million (\$1.6 billion), a decrease of US\$1.2 million (\$133.5 million) compared with 2013.

The **New Path** Programme (2014–2016) for US\$1.9 million (\$211.3 million) was approved for assistance to the South Camp Juvenile Correctional Centre for Girls. The programme will prepare young women with marketable technical skills, life skills, and individualized psychosocial support to enable their successful reintegration into society.

The following projects ended:

- The *Respect and Social Tolerance Programme* (2013–2014) with funding of US\$120 000 (\$13.4 million) provided assistance to the University of Technology, Jamaica. Support was aimed at building respect and social tolerance for diversity through public awareness initiatives and student engagement activities. Achievements included the development and presentation of research papers on social tolerance

and the preparation of a non-discrimination policy to the Governance Committee of the University

- The *USAID/Grace and Staff Community Development Education Outreach Project* (2012–2014) in the amount of US\$448 021 (\$49.8 million) assisted an at-risk youth initiative. The project supported four homework centres in the inner city, including the installation of over 70 computers and the launch of a Science, Technology, Engineering and Mathematics Centre in Central Kingston.

BOX 2.1 COMMONWEALTH DEBT INITIATIVE (CDI)

The CDI was spearheaded by the UK as one of the key outcomes of the Commonwealth Finance Ministers' Meeting in Mauritius in September 1997. Under this Initiative, Jamaica was granted debt relief of £70.1 million (\$12.8 billion) over a 16-year period (1998–2014).

Eligibility Criteria

The Initiative was intended to benefit the poor. To qualify as a beneficiary, Jamaica had to demonstrate a commitment to:

- internationally agreed development targets and pro-poor policies
- policies promoting transparent and accountable government
- and economic policies which encourage sustainable development.

Based on the above, indicators were developed by DFID against which Jamaica was assessed. These focused on economic policies, sound public financial management and commitment to pro-poor actions.

During the 16-year period, the PIOJ spearheaded the preparation of an annual CDI report which highlighted the Government's efforts to meet the agreed targets which were the basis for the granting of debt relief.

Under the grant component of **Venezuela's** Petrocaribe Energy Cooperation Agreement,²³ resources totalling US\$4.9 million (\$545.0 million) were approved for assistance to several sectors including Education, Energy and Community Development (see Box 2.2 for additional details).

23. 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.

BOX 2.2
PETROCARIBE ENERGY COOPERATION
AGREEMENT

Jamaica continued to benefit under the Petrocaribe Energy Cooperation Agreement with the Bolivarian Republic of Venezuela signed in 2006. A total of US\$4.9 million (\$545.0 million) in grant assistance was realized from the Fund compared with US\$4.1 million (\$456.0 million) in the previous year. Of this amount, US\$3.3 million (\$367.0 million) was disbursed to support initiatives, including:

- the establishment of a mechatronics laboratory at The University of West Indies, Mona
- construction of sanitation facilities in primary schools located in some of the poorest communities
- implementation of Jamaica Emergency Employment Programme (JEEP)
- implementation of energy conservation and energy efficiency measures for the Department of Microbiology at The University of the West Indies, Mona.

Loan financing approved from the Fund totalled US\$360.0 million (\$40.0 billion) compared with US\$345.7 million (\$38.4 billion) in 2013. Disbursements totalled US\$350.8 million (\$39.0 billion) and supported the refinancing of domestic debt, the expansion of the Noman Manley International Airport as well as a Line of Credit through the Development Bank of Jamaica for Business Processing Outsourcing.

Scholarships

Bilateral Partners and MTCs supported 193 Jamaicans—111 males and 82 females with scholarships totalling US\$5.8 million (\$645.1 million) to pursue studies in a number of disciplines. Short-term courses accounted for 62.8 per cent of total scholarships with the PRC providing 95.0 per cent of these courses (Table 2.4).

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 knowledge transfer. The main areas that received assistance were Health, Education, Environment and Disaster Mitigation (Table 2.5).

MULTILATERAL TECHNICAL COOPERATIONS (MTCs)

The **Commonwealth Fund for Technical Cooperation (CFTC)** disbursed £204 844 (\$37.5 million) on its portfolio of 14 projects which supported the Administrative, Social Infrastructure, as well as the Directly Productive sectors.

Five new projects were approved:

- *Jamaica National Export Strategy* – £70 000 (\$12.8 million)
- *Feasibility Assessment for a Dry Docking Facility* – £55 000 (\$10.1 million)
- *Supporting Jamaica's Services Expansion Plan Medical Tourism and Wellness* – £34 000 (\$6.2 million)
- *Promoting Human Rights Standards and Capacity Building in the Commonwealth* – £22 500 (\$4.1 million)
- *Capacity Building for the Government of Jamaica in the Development of the Oil and Gas Industry* – £32 321 (\$5.9 million).

The following projects were completed:

Promoting Human Rights Standards and Capacity Building in the Commonwealth (2014) for £22 500 (\$4.1 million) supported dialogue with Government, Parliament and state institutions on the establishment of a National Human Rights Institution (NHRI). The project created awareness and understanding of the importance and benefits of establishing a NHRI in Jamaica for the promotion and protection of human rights.

Support for Legislative Drafting (2013–2014) which was in the amount of £65 000 (\$11.9 million), provided assistance to the Government in drafting legislation required to meet commitments under the agreement with the International Monetary Fund. Some of the pieces of legislation were:

- *Income Tax Relief (Large-scale Projects and Pioneer Industries) Act, 2013*
- *Resolutions to Amend the Customs Tariff, 2013*
- *Orders to Amend the Stamp Duty Act, 2013*
- *Tax Collection (Miscellaneous Provisions) Act, 2014 (enacted)*
- *Amendments to the Tax Collection Act, 2013*
- *Tax Penalties (Harmonization) Act, 2014 (enacted)*

The Food and Agriculture Organization (FAO) portfolio included six national projects which were aimed at improving productivity, school nutrition, and providing income-earning opportunities. The Organization's budget totalled US\$298 107 (\$33.2 million) from which US\$109 041 (\$12.1 million) was disbursed.

One project, the *Mango Value Chain Analysis and Market Access Strategy in Jamaica*, was approved for US\$75 696 (\$8.4 million). The objectives of the project were to determine the market potential for Jamaican mangoes,

TABLE 2.4.
SCHOLARSHIPS AWARDED THROUGH ODA

COUNTRY	DISCIPLINE	PhD	MBBS	LLM (Law)	Masters	Bachelors	Short Course	Value of Award	No. Males	No. Females
Australia	Agriculture, Management, Labour Law, Environment, Economics and Government	4		1	2			1 231 613	7	0
China	Medicine, Applied Chemistry, Enterprise Management, Business Administration, Urban Planning, Public Policy and Rural Environment	3		13	2	137		3 484 771	92	63
Cuba	Medicine		4					257 680	1	3
Japan	Museology, Small & Medium Enterprises, Intellectual Disabilities, Engineering, Solid Waste Management, Renewable Energy and Sewage System Management						14	182 000	6	8
New Zealand	Management Studies Agriculture		1					111 836	1	
Russia	Construction Engineering, Architecture						2	46 900		2
Serbia	Medicine, Business Economy & Management	1			1			32 400		2
Sub-Total								5 347 200		
MTC										
Commonwealth Fund for Technical Cooperation	Tax Law , Spatial Planning, Food Safety, Hygiene, Earthquake Engineering, Empirical Economics and Finance	2			4			443 005	3	3
Organization of American States	International Trade Policy, Biological Science			1	1		52 239	1	1	
Sub-Total								495 245		
TOTAL		7	8	1	21	5	151	5 842 445	111	82

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

TABLE 2.5
PERSONNEL ASSIGNED TO JAMAICA BY ORGANIZATIONS AND FOCAL AREAS, 2014

Country	Organization/Programme	No. of Personnel	Focal Areas
Canada	CUSO	22	Information and Communication Technologies, Community Development, Business and Management, Education and Capacity Building.
Cuba	Medical Programme	88	Nurses
		28	Medicine - Nephrology , Neonatology, Pathology and Primary Care
		1	Cytotechnologist
Japan	Japanese Overseas Cooperation Volunteers Programme	20	Education, Environment, Transport and Works; Disaster Mitigation and Community Development
United States	Peace Corps	33	Education, Green Initiative and Health
Total		192	

CUSO is the former Canadian University Services Overseas

Source: Bilateral Partners and the Ministry of Health

assess the feasibility and profitability of an investment for upgrading the value chain, and establish a quarantine treatment facility for exports to the United States of America.

The following initiatives ended:

- *Bustamante High School and the Keith Primary School Telefood* projects in poultry production which amounted to US\$10 000 (\$1.1 million) each. These projects supported the Government's initiative to encourage the development of school gardens as a supplement to the nutritional programme for schools
- *Emergency Food Security and Rural Livelihood Recovery for the most Vulnerable Farmers affected by Hurricane Sandy in Jamaica* at a cost of US\$75 748 (\$8.4 million), aided small farmers to recover from the effects of the hurricane and exposed them to improved land management practices to increase their resilience against disasters. Through the Voucher for Work activity²⁴ 1 001 vulnerable small farmers were provided with agricultural inputs to support their recovery. The project also equipped Rural Agricultural Development Authority extension officers with educational material to promote good land husbandry practices and contributed to improved collaboration between participating stakeholders.

The **GEF Small Grants Programme (SGP)** had a new allocation of US\$464 000 (\$51.6 million) for the 2014–2015 biennium. Disbursements to its portfolio of 22 projects amounted to US\$379 392 (\$42.2 million) representing funds from the 2014 allocation in addition to balances from previous years.

Six new projects were approved:

- *Protecting the Natural Ecosystems and Preventing Land Degradation* – US\$50 000 (\$5.6 million)
- *Supporting Infrastructure towards the establishment of Special Fishery Conservation in Portland* – US\$50 000 (\$5.6 million)
- *Promoting Biodiversity Conservation through Medicinal Plant Production in Clarendon* – US\$119 000 (\$13.2 million)
- *Transforming Lives through Renewable Energy Initiative and Youth Empowerment in Majesty Gardens* – US\$50 000 (\$5.6 million)

- *Improving Climate Resilience for Sustainable Management of Natural Resources and Disaster Reduction in Mocho, Clarendon* – US\$150 000 (\$16.7 million)

- *Conserving Biodiversity while Generating Sustainable livelihoods through the Sawyers Restoration project* – US\$45 000 (\$5.0 million).

Six projects were completed which included the following:

- *Institutional strengthening and Capacity Building of NGOs and CBOs engaged in environmental and development projects* (2011–2014) which had a value of US\$20 000 (\$2.2 million) built the awareness in 80 NGOs and CBOs of the GEF SGP programme, facilitated documentation of best practices in environmental management, and undertook institutional strengthening and capacity building of selected NGOs/CBOs
- *Piloting Biodiversity Education in Jamaican Basic Schools* (2011–2013) in the amount of US\$45 000 (\$5.0 million), supported Government policy to teach environmental concepts at early childhood level. Subjects covered were reforestation, gardening and ornamental fish rearing
- *Reduction of the impacts caused by the Lionfish on reef fish biodiversity in the Montego Bay Marine Park and its environs* (2011–2014) which amounted to US\$50 000 (\$5.6 million), improved the income-earning capacity of community residents by training them in the handling, preparation and marketing of Lion Fish, as well as in the marketing of events featuring lion fish cuisine
- *Establishment of sanctuaries for protected Jamaican fauna and flora and providing energy efficient transportation for educational tours* (2012–2014) which amounted to US\$50 000 (\$5.6 million), supported the Hope Zoo in the conservation of selected species of iguana, snakes and coneys, training of zookeepers in animal husbandry, record keeping and public education
- *Promotion of renewable energy for Sustainable Production and Protection of Natural Resources* (2011–2014) in the amount of US\$40 000 (\$4.5 million), supported the Jamaica Federation of Commercial

24. Based on the completion of an agreed scope of work, farmers were awarded vouchers for redemption at participating farmers' stores.

Apiculturists with equipment for processing dried fruits, training in renewable technology, setting up HACCP²⁵ certified premises and acquisition of food handlers permit for each participant

- *Sunbeam Waste Conversion and Alternative Energy Project* (2012–2014) at a cost of US\$41 422 (\$4.6 million), supported the improvement of the piggery at the Sunbeam Boys Home through the construction of two bio-digesters, a drying bed and pond, extension of piggery unit and training of 40 persons including the residents in the operation and management of the bio-digesters.

The **Global Fund** to Fight AIDS, Tuberculosis and Malaria, had an allocation of US\$3.6 million (\$400.4 million) and disbursed US\$2.7 million (\$300.3 million) in the continued support of the government in the fight against HIV/AIDS. The Fund utilized strategies carried out under the Prevention, Treatment, Care and Support and Enabling Environment and Human Rights components of the National HIV/STI Programme. The Fund provided support as follows: strengthening of the legal and policy framework; the provision of anti-retroviral drugs and other commodities and services to persons infected by HIV; public education aimed at reducing risky sexual behaviour; building of strategies to reach most at risk populations; capacity building of service organizations; research to ensure evidenced-based approaches; and support of HIV work place policy.

The **International Atomic Energy Agency (IAEA)** supported five national projects for which there was an allocation of €852 450 (\$125.0 million). Of this sum, €109 532 (\$16.1 million) was disbursed. Under the 2014–2015 Country Programme, two new projects were initiated:

- *Re-Establishing Nuclear Medicine Capacity*, €558 450 (\$81.9 million)
- *Building Capacity in Drinking Water Quality Monitoring and Management*, €139 200 (\$20.4 million).

The following projects ended:

- *Developing National Capacities for the Application of Nuclear Science*, €226 100 (\$33.2 million) enhanced the knowledge of nuclear science in the Faculty of Science and Technology at UWI through the establishment of an advanced X-ray fluorescence and gamma spectrometry laboratory. The instruments built the capacity of the university's capacity to measure radioactivity levels in the environment, a technology

which is being applied in the vicinity of the bauxite companies and in areas surrounding waste disposal sites

- *Building Human Capacity in Medical Physics*, €106 764 (\$15.7 million) instituted an MSc degree programme in Medical Physics in the Department of Physics at UWI. This course has had an enrolment of 24 students to date, eight of whom have already graduated
- *Evaluating Ground Water Recharge and Pathways in Upper Rio Cobre*, €186 254 (\$27.3 million) provided the Water Resources Authority with equipment and training to determine the origin and dynamics of contamination pathways between the Upper and Lower Rio Cobre region. The technical officers of the organization were trained in the use of isotopes and dye tracing as well as advanced water quality analysis techniques.

The **Organization of American States (OAS)** had a budget of US\$2.6 million (\$289.2 million) for 12 national projects. Jamaica also participated in 25 regional activities. Focal areas were energy and environment; rural youth capacity building and business development; institutional strengthening in relation to science and technology education; security and justice, which include cybersecurity and drug abuse control. The following project was initiated:

Craft Enhancement and Business Planning Training to support Human Capacity Building in the Public and Private Sectors, US\$138 826 (\$15.4 million). The OAS also administered US\$1.9 million (\$211.3 million) for Promoting a Healthy Environment and Productive Alternatives for Juvenile Remandees and Offenders in Jamaica on behalf of USAID.

The **Pan American Health Organization (PAHO)**, from its regional programme, allocated US\$398 525 (\$44.3 million) to Jamaica. A total of US\$197 983 (\$22.0 million) was disbursed to support its strategic areas of focus for the biennium, 2014 and 2015, namely: Communicable Diseases; Non-Communicable Diseases; Determinants of Health and Promoting Health Throughout the Life Course; Health Systems and Preparedness; Surveillance and Response. Highlights of the intervention included the following support to the Ministry of Health with the following activities:

- *support to the National Cancer Registry*
- *procurement of sickle cell screening equipment*
- *development of a comprehensive forensic psychiatry plan*

25. The Hazard Analysis and Critical Control Points (HACCP) system is a scientific and systematic approach to identify, assess and control hazards in the food production process.

- *development of an infant and young child feeding policy; Chikungunya response and Ebola preparedness.*

The Joint United Nations Programme on HIV and AIDS (UNAIDS) had an allocation of US\$66 746 (\$7.4 million) from which it disbursed US\$35 652 (\$4.0 million) for the 2014–2015 biennium, to provide technical and financial assistance for projects and activities aimed at decreasing the rate of transmission of HIV. All interventions started and concluded in 2014. The following were among the activities benefiting from UNAIDS support:

- *Costing of the National Strategic Plan on HIV and AIDS and preparation of a national AIDS spending assessment*
- *Programme for Prevention of Mother to Child Transmission of HIV*
- *Training of Government officials in the utilization of economic modeling tools to develop HIV funding estimates*
- *Consultations on stigma and discrimination—which led to the development of a strategy to address those issues*
- *Development of the draft National Gender-Based Strategic Plan*
- *Preparation of the Global AIDS Response Progress Report (GARPR), HIV estimates and Composite Policy Index*
- *Support to the integration of HIV and Sexual and Reproductive Health at organizational and policy levels.*

The United Nations Development Programme (UNDP) had a budget of US\$2.6 million (\$289.2 million) from which it disbursed US\$1.9 million (\$211.3 million) to fund 16 projects in the areas of governance, environment, energy and poverty reduction. The organization supported study tours to Chile and Peru, designed to enhance knowledge in establishing an effective institutional framework to reduce poverty, and improve and expand social protection at a cost of US\$84 117 (\$9.4 million). The UNDP also supported a training course targeting officers of the Jamaica Constabulary Force (JCF) to improve national capacities to address scenarios relating to kidnapping/hostage and extortion situations.

The following projects were initiated:

- *National Biodiversity Planning to Support the Implementation of the Convention on Biodiversity 2011–2020 Strategic Plan in Jamaica (NBSAP) – US\$33 328 (\$3.7 million)*
- *Third National Communication (TNC) and Biennial Update Report (BUR) to the United Nations Framework Convention on Climate Change – US\$45 279 (\$5.0 million)*
- *Support to the West Kingston Commission of Enquiry – US\$300 000 (\$33.4 million)*
- *Engagement Facility for support of capacity building initiatives in MDAs – US\$51 000 (\$5.7 million)*
- *GEF²⁶ 5: Project Preparation Grant “Deployment of Renewable Energy” – US\$30 000 (\$3.3 million)*
- *Preventing Human Trafficking – US\$30 000 (\$3.3 million).*

Four projects were completed:

- *Enhancing Civil Society Participation in Local Governance for Community Safety (2011–2014)* at a cost of US\$34 485 (\$3.8 million) facilitated the establishment of 12 Parish Safety and Security Committees in 11 parishes (two in St. Catherine) to provide a coordinated local civil society and state response to crime and violence
- *Mainstreaming Migration into National Development Plan (2011–2014)* in the amount of US\$16 546 (\$1.8 million) produced a draft Migration Policy and an accompanying Diaspora Policy
- *HIV and the Law Phase 1 (2012–2014)* supported the Conduct of Legal Assessment of HIV-related Laws and Policies from which a Plan of Action on Legal Reform in the amount of US\$4 963 (\$0.6 million) was developed
- *Building Capacity for Reform of HIV-Related Law and Policy in Jamaica (2014)* which totalled US\$20 327 (\$2.3 million), provided advocacy support for the amendment of the 2009 Sexual Offences Act.

United Nations Education, Scientific and Cultural Organization (UNESCO) had a budget of US\$1.9 million

26. The Global Environment Facility (GEF) is an organization that supports countries in addressing environmental issues through activities related to biodiversity, climate change, international waters, land degradation, and control of chemical usage. Through its Small Grants Programme (SGP) it provides grants to civil society organisations for projects which support national objectives in these areas

(\$211.3 million) from which it disbursed US\$1.8 million (\$200.2 million) to support 12 national initiatives in the areas of Communication and Information, Education, Skills Development and Culture. Jamaica also participated in two regional projects in Education and Communication.

Three new initiatives were approved:

- *UNESCO Awards for Excellence for Handicrafts* – US\$24 500 (\$2.7 million) is a programme designed to promote the creative industry by assessing and certifying local handicraft
- increasing the visibility of UNESCO through a *Training of trainers programme for youth* – US\$15 000 (\$1.7 million) provides for the education of youth on local and international cultural and natural heritage and on the preservation of national heritage
- Support the preservation and access to the *National Indentureship Collection in the National Library* – US\$26 000 (\$2.9 million).

Two projects were concluded:

- *Regional Capacity Building in Education Statistics and Education For All (EFA) MDG Goals* at a cost of US\$40 000 (\$4.4 million) sponsored the participation of officers of STATIN, Ministry of Education and Jamaica Foundation for Lifelong Learning to a workshop in Jamaica on education statistics, data collection, analysis and reporting
- *World Press Freedom Day* in the amount of US\$18 000 (\$2.0 million) supported over 25 journalists from across the Caribbean to participate in the Caribbean Media Conference hosted by Jamaica in May 2014.

United Nations Children’s Fund (UNICEF) allocated US\$2.0 million (\$222.4 million) and disbursed US\$1.8 million (\$200.2 million) for 25 projects in the Social Infrastructure sector within the thematic areas: Child Protection, Advocacy, Public Policy and Partnerships, Children and HIV/AIDS, and Quality Education. Initiatives undertaken focused on strengthening of the legal framework to improve the capacity of Government for child protection; improvement of mental health and psycho social services for children in conflict with the law; drug abuse prevention among adolescents; development of screening tools for children and families; and building capacity to incorporate children’s issues into local planning frameworks.

Fourteen new initiatives were approved:

- *Ropes Challenge Course for At-Risk Boys and Girls* – US\$17 573 (\$2.0 million)

- *Elimination of Mother-to-Child Transmission* – US\$33 500 (\$3.7 million)
- *Chronic Illness in Jamaican Adolescents* – US\$42 700 (\$4.7 million)
- *Life Skills Intervention in Two Juvenile Institutions* – US\$17 884 (\$2.0 million)
- *Implementation of School-Wide Positive Behaviour Support and Intervention Systems* – US\$125 696 (\$14.0 million)
- *Strengthening Child Protection Committees* – US\$40 460 (\$4.5 million);
- *Support to Multi Agency Initiative for Prevention of Child Abuse* – US\$35 964 (\$4.0 million)
- *Report on United Nations Convention on the Rights of the Child (UNCRC) and Optional Protocol* – US\$5 934 (\$0.7 million)
- *Communication Campaign and web development* – US\$41 636 (\$4.6 million)
- *Raising awareness on disciplinary practices* – US\$3 925 (\$0.4 million)
- *Supportive environment for adolescents in juvenile correctional/remand centres* – US\$49 743 (\$5.5 million)
- *Implementation of Choice Community Grants* – US\$21 513 (\$2.4 million).
- *Child Protection in Local Governance and Health study tours to Brazil* – US\$121 017 (\$13.5 million)
- *Vision 2030 Jamaica – National Development Plan Dashboard update* – US\$16 813 (\$1.9 million).

Ten projects were concluded:

- *Community Action to prevent Alcohol and Marijuana-related harm and Risky Sexual Behaviours among underage Youth in Jamaica (2013–2014)* – US\$46 078 (\$5.1 million) introduced course prevention measures to 800 vulnerable adolescents and young people, supported the establishment of 20 community drug abuse prevention councils, and established youth diversion programmes to engage adolescents
- *Ropes Challenge for At Risk Boys and Girls (2014)* – US\$17 573 (\$2.0 million) constructed an outdoor challenge course for personal development and team building programmes. It provided physical and mental

stimulation for 96 at risk youth from the parishes of Kingston, St Andrew and St Elizabeth

- *Research to identify causes of suicide among children and adolescents* (2013–2014) – US\$15 802 (\$1.8 million), revealed that 20.0 per cent of adolescents are at risk for committing suicide; there is a relationship between suicide risk and factors such as parental attention to school work and interpersonal conflict; and more males than females committed suicide
- *The longitudinal study: An evaluation of the current status of maternal, paternal, newborn and infant health and well-being and the impact of these on national child health and development in the early years* (2011–2014) – US\$84 759 (\$9.4 million), generated data sets on the biological and social factors affecting maternal health and infant, and child development
- *Associate Degree in Child Development Therapy* (2012–2014) – US\$22 624 (\$2.5 million) was developed and piloted, with 16 participants who are involved in public rehabilitative services at the UWI. The course built the capacity of the national system to support children with disabilities
- *Enabling Quality Education for Children with Special Needs* (2012–2014) – US\$96 965 (\$10.8 million) assisted with the development and implementation of a service model for children with disabilities that supported the screening of 2 139 students for hearing and vision impairment, educational assessment of 663 students and referral from these groups to treatment services
- *Inspire Jamaica: Screening and Early Intervention System for Children and Families* (2012–2014) – US\$61 064 (\$6.8 million) supported the development of national screening, referral and early intervention tools intended to enable early screening for age appropriate developmental readiness
- *Report on the UNCRC and optional protocol* (2014) – US\$5 934 (\$0.7 million) supported the updating of the report to the UNCRC and Report on the Optional Protocol on the involvement of Children in Armed Conflict
- *Child Awareness Campaign* (2014) – US\$2 604 (\$0.3 million) undertaken under the Ananda Alert Programme, established an islandwide network of over 15 organizations and professional groups to participate in search and rescue operations for missing children and facilitated the signing of a memorandum of understanding between the Office of the Children's Registry and the Jamaica Library Service, to disseminate information regarding missing children

- *Raising awareness on disciplinary practices* (2014) – US\$3 925 (\$0.4 million) supported collaboration with the media in producing and airing a documentary on corporal punishment during Child Month.

United Nations Population Fund (UNFPA) continued support of programmes promoting comprehensive and integrated sexual and reproductive health services, adolescent development, especially adolescent girls, and strengthening of national policies and Government's capacity to meet international development agendas. Among the areas of focus were:

- *Capacity strengthening in reproductive health logistics management for Jamaica*
- *Financial and technical support towards the development of the National Sexual and Reproductive Policy for Jamaica*
- *Advocacy and technical support to mobilize resources for implementation of the Reproductive Health Survey in Jamaica*
- *Consultancy to review the Health and Family Life Education (HFLE) curriculum in teacher training institutions*
- *Training of midwife educators to deliver competency-based midwifery education.*

OUTLOOK

ODA will continue to play an important role in Jamaica's pursuit of growth and development. The Government will collaborate with its development partners to ensure that the resources made available target development priority areas and are used in a manner which maximizes efficiency and effectiveness.

Discussions regarding the new Country Strategy with IDB for calendar years 2015–2018 will be finalized within the context of the current Extended Funded Facility with the International Monetary Fund, which has constrained fiscal space allocation for fiscal years (FYs) 2015/16 to 2018/19. IDB's assistance will be carefully targeted at areas and sectors which will advance the GoJ's broad-based reform agenda. Most of the financing from the Bank under the forthcoming CS is expected to be in the form of budget support.

It is anticipated that a total of US\$167.0 million (\$18.6 billion) will be approved by the World Bank under the 2013–2017 Country Partnership Strategy (CPS) to support two Policy Loans and one investment project. The second tranche of US\$10.0 million (\$1.1 billion) from the CDB is expected to be disbursed under the Fiscal Consolidation Growth and Social Stability Policy-based Loan. For 2015, the Government will prepare projects under the 11th EDF NIP within the focal sectors identified. The country will also position itself to

benefit from the EU Caribbean Regional Programme, which has a financing envelope of €346.0 million (\$50.8 billion).

As it pertains to bilateral assistance, new grant funded projects with the government of Turkey in support of education and agriculture are anticipated in 2015. Negotiations are expected to be finalized for a Japanese Cultural Grant to the Institute of Jamaica (IOJ) in the sum of US\$490 190 (\$54.5 million) which will be utilized to enhance the technological capability of the IOJ. Grant resources from the governments of India and the PRC are expected to be made available to the Government to finance projects to be mutually agreed.

To buttress the Government's growth agenda, support will continue to be garnered from the MTC agencies to undertake initiatives in potential growth areas. The Commonwealth Secretariat will facilitate the review of the National Export Strategy; support a Services Expansion Plan through the introduction of Medical and Wellness Tourism; support plans to establish Jamaica as a shipping hub by assessing the feasibility of establishing dry docking facilities in Jamaica; and building capacity to manage a potential gas and

petroleum industry. The Agriculture sector will be targeted by the UN Country team through a joint water management project which will ensure the availability of irrigation water for rural villages impacted by drought. Projects financed by the FAO, OAS and SGP will be more closely aligned with Government's programmes such as the Agro Parks and the School Feeding Programmes.

Project prioritization will be an imperative against a backdrop of severe fiscal constraints. With assistance from DFID and the World Bank, the Government intends to implement its newly developed Public Investment Management Systems (PIMS) which is geared towards establishing procedures governing the identification, appraisal and approval of investment projects. The PIMS will facilitate the prioritization of projects for financing, based on their alignment with Jamaica's development agenda and on agreed quantitative and qualitative criteria. Finally, Jamaica will aggressively pursue funding for climate change mitigation and adaptation activities from available sources of climate financing. ■

SUSTAINABLE DEVELOPMENT



Tyre Soil Wall to reduce landslide risk in Breastworks, Portland.

Photograph contributed by ODPEM

SUSTAINABLE DEVELOPMENT

INTRODUCTION

Sustainable development (SD)¹ activities for the year focused predominantly on building climate change resilience; sustainable management of natural resources; hazard risk management; local sustainable development planning; institutional strengthening and capacity building; geospatial information management and awareness raising. These actions were aligned with the national and sectoral strategies of *Vision 2030 Jamaica – National Development Plan and the Medium Term Socio-Economic Policy Framework, 2012–2015*. Key activities included the :

- development of “Near-term Climate Scenarios for Jamaica” (up to 2040) for the entire island, and specifically for the Rio Minho and Rio Bueno-White River Watersheds
- continuation of the implementation of the Pilot Program for Climate Resilience (PPCR), specifically the design and approval of Investment Projects 2 and 3 “Adaptation Program and Financing Mechanism for the Pilot Program for Climate Resilience (PPCR) Jamaica” to increase Jamaica’s resilience to climate change by enhancing the adaptive capacity of the agriculture and tourism sectors, watershed management and the provision of financing for community level adaptation
- use of Geographic Information Systems (GIS) and Remote Sensing technology to conduct a national land use change analysis which showed a decline in the quality of forests despite a net increase in forest cover of 0.4 per cent per annum between 1998 and 2013
- development and dissemination of materials to promote climate change awareness
- reform of the Development Applications Review Process (DARP) to expedite the review of applications by the relevant authorities, aimed at stimulating

economic opportunities for overall growth and investment.

GLOBAL REVIEW OF SUSTAINABLE DEVELOPMENT

Climate Change

Jamaica contributed to international efforts to address climate change, mainly under the United Nations Framework Convention on Climate Change (UNFCCC). The 20th Conference of the Parties (COP 20) was held in Lima, Peru in December. The primary outcomes of the conference, held in South America for the first time, included:

- Decision for the Ad Hoc Working Group on the Durban Platform for Enhanced Action to continue work on a “protocol, another legal instrument or an agreed outcome with legal force under the Convention applicable to all Parties” for adoption at COP 21 and as a successor to the Kyoto Protocol. The effective date of the new agreement is 2020
- Pledges for the Green Climate Fund (GCF), reaching US\$10.14 billion. US\$9.3 billion was pledged in a previously held GCF Pledging Conference in September
- Agreement on the organisational framework of the Warsaw International Mechanism for Loss and Damage, and nomination of members of the Executive Committee (each of whom will serve a term of two years). Jamaica was among the countries nominated to serve. The Mechanism will assist developing countries in addressing extreme weather events and slow onset hazards
- Adoption of the Lima Ministerial Declaration on Education and Awareness-raising which calls on Parties to “develop education strategies that incorporate the issue of climate change in curricula”

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

and in the design and implementation of national development strategies and policies.

The UN Climate Summit 2014 was convened in September to increase action and engender political will regarding climate change, particularly with respect to the development of a new climate change agreement. In the same month, a People's Climate March was staged in New York to raise awareness for increased action to reduce emissions and stem the rate of global warming.

The Fifth Assessment Report (AR5) was completed by the Intergovernmental Panel on Climate Change (IPCC). The AR5 provides a comprehensive assessment of climate change and builds on the data and information of previous reports. It contains four reports, namely: The Physical Science Basis; Impacts, Adaptation, and Vulnerability; Mitigation of Climate Change; and the Synthesis Report.

Based on preliminary data from the National Oceanic and Atmospheric Administration (NOAA), greenhouse gas (GHG) emissions have continued to increase (Figure 3A). Annual atmospheric concentrations averaged 398.5 parts per million (ppm) in 2014 compared with 396.5 ppm in 2013.

The global average temperature for land and ocean, when combined, was 14.5°C (58.2°F), an increase of 0.69°C (1.24°F) above the 20th century average². This year was the hottest since temperature recording began in 1880. The

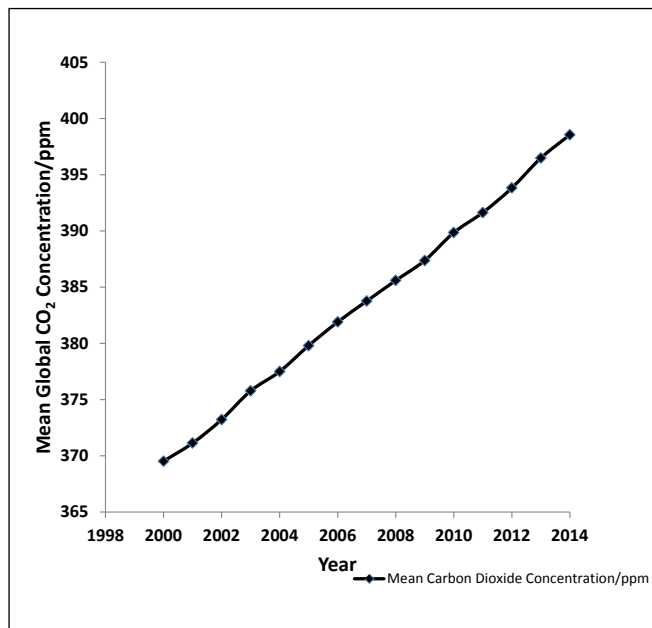


FIGURE 3A: ATMOSPHERIC CONCENTRATIONS OF CO₂, 2000–2014

average oceanic temperature was also the highest on record, partly due to monthly record highs in June, August and September. In keeping with these global trends, Jamaica's climate experienced an overall increase in temperature in 2014 (see section on Climate).

Small Island Developing States and the Post-2015 Development Agenda

The 3rd International Conference on Small Island Developing States (SIDS) was held in Apia, Samoa under the theme, "The sustainable development of SIDS through genuine and durable partnerships". The conference marked the commemoration by the UN of 2014 as the International Year of SIDS, highlighting their unique characteristics, circumstances and vulnerabilities. Heads of State and Governments, including Jamaica, adopted the outcome document SIDS Accelerated Modality of Action (S.A.M.O.A.) Pathway which outlined the 18 priority themes for SIDS in achieving SD individually and collectively. These thematic priorities including Sustainable Energy; Food Security and Nutrition; Social Development; and Biodiversity are expected to influence the international and national development agendas.

Jamaica contributed to the work on the Post-2015 Development Agenda which advanced with the identification of proposed Sustainable Development Goals (SDGs) to build on and expand the goals and targets of the Millennium Development Goals which expire in 2015. Among the areas addressed in the proposed goals are climate change, sustainable consumption and production, sustainable water management, waste management, cities and human settlements and natural resources (oceans and seas, biodiversity and terrestrial ecosystems) {See chapter on Population}.

Natural and Manmade Hazards

Human and economic losses associated with natural and man-made disasters, although relatively high, declined in 2014. Preliminary estimates from leading international reinsurers indicated that total economic losses from natural catastrophes and man-made disasters amounted to US\$113.0 billion in 2014, down from US\$135.0 billion in 2013. Of the total economic losses, insurers covered US\$34.0 billion, down 24.0 per cent from US\$45.0 billion in 2013. Approximately 11 000 lives were claimed by disaster events, down from over 27 000 fatalities in 2013³. Events included the Polar Vortex in USA in January, heavy snow in Japan, and storms in Europe and the United States in the middle of the year. The most costly catastrophe of the period was the February snow storm in Japan which accounted for US\$7.5 billion in insured and economic losses. Of the estimated total economic losses, natural hazards totalled US\$106 billion,

2. <http://www.ncdc.noaa.gov/sotc/global/2014/13>

3. Swiss Re.

down from US\$126.0 billion in 2013. This figure is below the average annual US\$188.0 billion loss figure of the previous 10 years. The decline in the human and economic cost of natural disasters has been primarily attributed to improved early warning systems

The 2014 Atlantic Hurricane Season was relatively quiet, producing the fewest tropical cyclones and named storms since 1997. Nine tropical cyclones were formed, six of which became hurricanes, and three major hurricanes. Jamaica had a very dry summer, leading to severe drought conditions in some parishes during June/July. The drought affected agricultural output.

Chemicals Management

In June, a Special Programme was adopted by the UN Environment Assembly (UNEA), to support institutional strengthening at the national level for implementation of the Basel, Rotterdam and Stockholm Conventions (BRS), the Minamata Convention, and the Strategic Approach to International Chemicals Management (SAICM). The Programme is a direct response to a call made by Governments to strengthen the financial basis for the implementation of the legally binding chemicals and waste conventions. It enables financial support to be provided to developing countries and countries with economies in transition, to enhance their sustainable institutional capacity to develop, adopt, monitor and enforce policy, legislation and regulation, and to gain access to financial and other resources for effective frameworks for the implementation of the BRS and Minamata Conventions, as well as SAICM⁴.

Spatial Data Management

The global geospatial community continued to support sustainable development planning with particular focus on the United Nations Post-2015 Development Agenda for which geospatial data management is identified as a critical success factor. In this regard, the Third High Level Forum on United Nations Global Geospatial Information Management in Beijing in October addressed the role of geospatial information in the Post-2015 Development Agenda.

Jamaica participated in the Fourth Session of the UN Committee of Experts on Global Geospatial Information Management (UN-GGIM) held in August in New York where

there was adoption of a resolution on the establishment of a Global Geodetic Reference Frame (GGRF)⁵ for Sustainable Development. The GGRF outlines the value of ground-based observations and remote satellite sensing when monitoring changes in socio-economic or environmental subjects over time. Such geospatial measurements can support sustainable development policymaking, climate change monitoring and natural disaster management, and also have a wide range of applications for transport, agriculture and construction⁶.

The increased use of Unmanned Aerial Vehicles (UAVs) in combination with GIS, continued to be among the leading emerging technologies for GIS professionals. The technology was used to capture high-quality, near real-time imagery to support commercial activity, emergency management, and agricultural projects. Among the visualization benefits of twinning UAV with GIS is the production of Full Motion Videos⁷ which have been used to monitor test fires in wildfire research and pipeline monitoring. Other emerging topics and research interests included: the development of more user friendly and flexible web mapping development software; more hybrid GIS setups which include the use of both Open Source and Commercial Off the Shelf GIS software; the use of the Cloud as a means of data storage; and “Software as a Service” (SaaS)⁸.

SD AT THE NATIONAL LEVEL

According to the *2014 Human Development Report*, Jamaica remained in the High Human Development Category of the Human Development Index, despite falling three places, with a score of 0.715 and a rank of 96 out of 187 countries and territories.

In the social sphere, access to education remained relatively high at the lower levels of the education system, while overall, the school age population (3–24 years) enrolled in educational institutions was 71.3 per cent. As it relates to health, latest available data from the *Jamaica Survey of Living Conditions (JSLC) 2012*⁹ indicated that the health status of the population remained relatively good with 84.7 per cent reported as having generally good or very good health. During 2014, the country experienced the outbreak of the Chikungunya Virus (Chik V). Over 4 000 notifications were made to the Ministry of Health, with the largest number of suspected cases (924) occurring among the working age

4. UN Chemicals Branch Newsletter, November 2014.

5. Geodesy is the science of accurately measuring and understanding three fundamental properties of the Earth: its geometric shape, its orientation in space, and its gravity field— as well as the changes of these properties with time. (NOAA).

6. <http://www.unggrf.org/>

7. A Full Motion Video is a Video transmission that changes the image 30 frames per second (30 fps). Motion pictures are run at 24 fps, which is the minimum frequency required to eliminate the perception of moving frames and make the images appear visually fluid to the eye.

8. Software as a Service (SaaS) is a software distribution model in which applications are hosted by a vendor or service provider and made available to customers over a network, typically the Internet.

9. The latest available data.

TABLE 3.1
SELECTED SUSTAINABLE DEVELOPMENT INDICATORS, 2010–2014

INDICATOR	2010	2011	2012	2013	2014
Quality of Life					
% of Households with Access to Piped Water	70.3	n/s	69.9	n/a	n/a
% of Households with no means of Excreta Disposal	0.5	n/s	0.2	n/a	n/a
% of Households Squatting	0.1	n/s	1.0	n/a	n/a
Housing Quality Index	71.5	n/s	72.0	n/a	n/a
Poverty and Inequality					
% Household below Poverty Line	12.4	n/s	14.4	n/a	n/a
Share of Poorest Quintile in National Consumption	6.6	n/s	6.4 ^r	n/a	n/a
Gini Coefficient	0.3813	n/s	0.3748	n/a	n/a
Communication					
Fixed Telephone Penetration per 100 population	10.5	10.0 ^r	9.3	9.2 ^r	9.3 ^p
Mobile Penetration per 100 population	117.6 ^t	112.1 ^t	100.1 ^t	104.7 ^t	105.8 ^p
Internet use per 100 population	n/a	n/a	33.8	37.8	n/a
Percentage of households with access to computers	26.0	n/s	32.5	n/s	n/s
Environmental					
Annual rate of change, Broadleaf Forest	-0.2 ^p	-0.2 ^p	-0.2 ^p	-0.2 ^p	-0.2 ^p
Annual rate of change, Open Dry Forest	-7.2 ^p	-7.2 ^p	-7.2 ^p	-7.2 ^p	-7.2 ^p
Energy Consumption per capita (BOE)	7.5	7.7	7.5 ^r	7.0 ^r	7.0 ^p
Alternative Energy ('000 BOE)	816 ^t	1 057 ^t	1 014 ^t	1 182 ^t	1 216 ^p
Per Capita Domestic Water Consumption (Megalitres)	0.036	0.038 ^p	0.035 ^p	0.034	0.030 ^p
Annual Rainfall (mm)	2 272	1 747	1 567	1 470	1 506
Average Annual Temperature (°C) ^a	27.9	27.9	28.0	28.2	28.3
Population ('000)	2 695.5	2 704.1 ^t	2 711.5	2 718.0	2 723.2
% Population in Urban Areas ^c	52.0	52.0	54.0	54.0	54.0
Per Capita Waste Generation (kg/day)	n/a	n/a	n/a	1.1 ^t	1.0

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), reporting agencies, and International Telecommunications Union

population (persons 20–64 years). Although incidence of violence-related and other injuries, mental disorders, and chronic non-communicable diseases continued to add to the public health burden, there was a 9.3 per cent decline in the reported cases of injuries seen in emergency rooms at public health facilities islandwide (see chapter on Health).

Access to and use of ICT continued to improve reducing the digital divide. This was reflected in a number of indicators including the mobile penetration rate, access to computers, teledensity and broadband deployment (see Chapter on STI). Jamaica's rank on the ICT Development Index improved by one place to 97 out of 166 while experiencing an equivalent decline in the Network Readiness Index (NRI) with a rank of 86 out of 148 (score of 3.8). Jamaica's Fixed Telephone Penetration increased to 9.3 per one population in 2013. Mobile Penetration also increased to 105.8 per 100 population relative to 104.7 per one population

in 2013 (Table 3.1). This combined to produce the country's teledensity rate 115.1 per 100 population, up from 113.9 per 100 population in 2013.

In the area of environmental management, there was a reported net increase in forest cover and increased acreage in reforestation. However, there was an overall annual decline in the quality of forests due to decreases on Broadleaf and Open Dry Forest classes of 0.2 per cent and 7.2 per cent, respectively (see Table 3.1). There was net accretion in beach width despite erosion in a number of sites. The indicators of water quality were not as positive, particularly with respect to biological oxygen demand (BOD) and faecal coliform which were above acceptable levels in the majority of the areas assessed. Water availability was impacted by the decrease in rainfall and consequently, a decline in surface water. Temperatures continued to increase, averaging 28.3°C in 2014 relative to 28.0°C and 28.2°C in 2012 and 2013, respectively (see Table 3.1).

TABLE 3.2
BUDGETARY ALLOCATIONS FOR SELECTED ENVIRONMENTAL MANAGEMENT
AND RELATED PROGRAMMES, FY 2013/14 TO 2014/15

	Revised Estimates 2013/14			Estimates 2014/15			Percentage Change
	RECURRENENT	CAPITAL A&B	TOTAL	RECURRENENT	CAPITAL A&B	TOTAL	
Environmental Protection ^a	993 748	313 559	1 307 307	953 551	219 040	1 172 591	-10.3
Waste Management	778 749	40 000	818 749	810 014	20 000	830 014	1.4
Forestry	493 940		493 940	471 738		471 738	-4.5
Disaster Management ^b	296 049	84 387	380 436	309 072	72 987	382 059	0.4
Fire Protection	3 427 120	223 915	3 651 035	4 816 913	13 256	4 830 169	32.3
Land Resources Management ^c	1 640 969	322 220	1 963 189	1 843 542	358 183	2 201 725	12.2
Water Resources Management	146 152	3 421	149 573	157 042	12 405	169 447	13.3
Total	7 776 727	987 502	8 764 229	9 361 872	695 871	10 057 743	14.8

a - Environmental Protection reflects allocations to the National Environment and Planning Agency, and environmental management and meteorological services under the Ministry of Water, Land, Environment and Climate Change

b - Disaster Management reflects allocations to the Office of Disaster Preparedness and Emergency Management and Emergency Management of the Ministry of Health

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

Source: Estimates of Expenditure for the year ending March 31, 2014 as passed

Planning and Policy Development and Legislative Framework

The Climate Change Policy Framework was advanced during the year under the leadership of the Ministry of Water, Land, Environment and Climate Change (MWLECC). The Policy, previously tabled in Parliament, was reviewed by stakeholders islandwide via the internet and at regional consultations in St Mary, St James, St Elizabeth and Kingston and St Andrew. It was subsequently updated as a draft White Paper based on inputs from the consultations and submitted to Cabinet for review.

The policy and legislative framework for natural and environmental resources was enhanced with:

- the promulgation of the National Orchid Policy in February. This Policy is geared towards the sustainable use and conservation as well as research and public education and awareness of orchids
- stakeholder review of the Dolphin Policy (a Green Paper) through public consultations in St Ann, St James, Hanover, Westmoreland and Kingston and St Andrew. The feedback received is being incorporated in the preparation of a draft White Paper for submission to and approval by both Houses of Parliament. The Policy addresses “dolphins in Jamaican waters, the trading of dolphins, and dolphin attractions”

- approval by Cabinet of the new Forest Policy (see Forest Resources section)
- approval by Cabinet of the Policy Framework and Procedures Manual for the Divestment of Government-owned Lands (Divestment Policy) in December. This manual is to guide the land divestment process to facilitate equitable and broad-based ownership, encourage investment, and stimulate economic growth and social welfare. It is based on the principles of transparency, equity, fairness and efficiency.

Financing for SD

For the Financial Year 2014/15, budgetary allocations for selected SD thematic areas totalled \$10.1 billion, a 14.8 per cent increase relative to the FY 2013/14 (Table 3.2). This accounted for 1.9 per cent of the total GOJ budget¹⁰. The increase was accounted for, in part, by a 32.3 per cent upward movement in subventions to Fire Protection services to facilitate the maintenance of fire trucks and stations, as well as the purchase of fire equipment and additional trucks.

The Environmental Foundation of Jamaica (EFJ) and the Jamaica Protected Areas Trust (JPAT)/Forest Conservation Fund (FCF) continued to support selected environment-related activities through Non-Governmental and Community-Based Organisations and academia. While no calls for proposals were issued in light of ongoing efforts to merge the two entities,

10. Budgetary allocations for the FY 2013/14 were 1.8 per cent of the total GOJ budget.

the FCF approved \$26.1 million for two previously submitted proposals. The programmes relate to environment and climate change education within the Blue and John Crow Mountains National Park, and coastal forest restoration including the expansion of the mangrove plant nursery at the Port Royal Marine Laboratory and training of stakeholders. The ongoing projects which continued to receive support are related to reforestation, watershed protection, livelihood diversification (including bee-keeping, eco-tourism) and capacity building. The EFJ partnered with the Inter-American Foundation (IAF) to continue the implementation of 19 projects related to water harvesting, disaster risk reduction, recycling and community water systems over the period August 2013 to July 2014. These projects benefited 46 191 persons directly.

The National Protected Areas Trust Fund (National Conservation Trust Fund of Jamaica) was established in 2014 to provide additional financing for protected areas. Resources of Trust Fund will be provided by the Caribbean Biodiversity Fund once fully operational. This activity was initiated by the GOJ/GEF/UNDP National Protected Areas Project.

Natural Disaster Risk Financing

The country continued to pursue risk financing measures as a part of the general risk management strategy for the island. In this regard, US\$4.0 million was spent on insurance premiums for coverage under the Caribbean Catastrophic Risk Insurance Facility (CCRIF) Segregated Portfolio Company

(SPC)¹¹. The insurance policies cover tropical cyclone and earthquake damage to a limit of US\$65.1 million and US\$63.4 million, respectively. As in previous years, CCRIF offered two one-off premium discount options due to a third successive year in which none of the policies held by member countries were triggered. The options were: a 25.0 per cent discount on tropical cyclone and earthquake policy premium, if no excess rainfall policy is purchased; and up to a 50.0 per cent discount, if applied to an excess rainfall policy. Jamaica, having not purchased the excess rainfall policy, benefited from the former. Eight member countries purchased the excess rainfall insurance coverage for the 2014/2015 policy year and three received payouts from the facility amounting to US\$3.4 million in 2014.

Jamaica is among 16 member countries of the CCRIF that will benefit from the first ever catastrophe bond (“cat” bond) issued by the World Bank. The US\$30.0 million transaction will address earthquake and tropical cyclone risks in the CCRIF member countries and provides for the diversification of the risk target mechanisms which were previously limited to the traditional re-insurance market. Participation in the “cat” bond market provides the CCRIF access to more competitive prices which will redound to the benefit of member countries. The “cat” bond provides three years of annual aggregate protection for hurricanes and earthquakes affecting the CCRIF member countries, using the same triggers and measurements as the Facility’s underlying parametric insurance model.

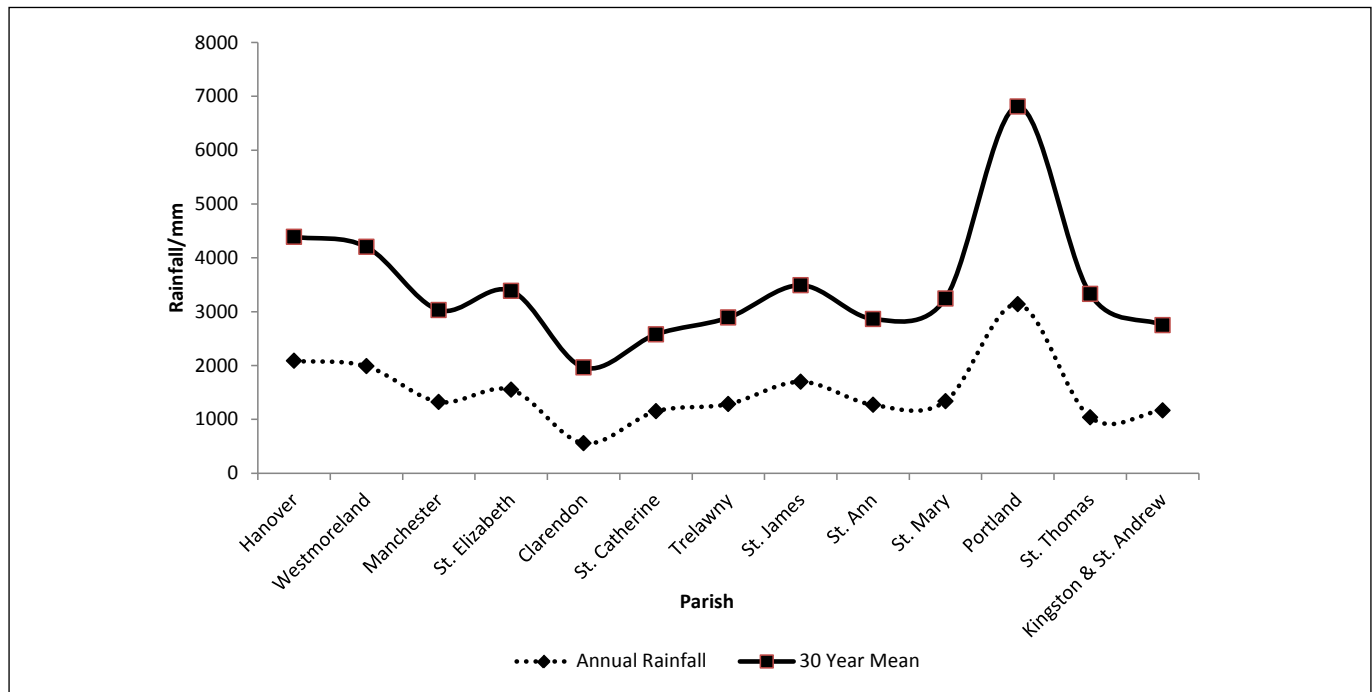


FIGURE 3B: MEAN RAINFALL BY PARISH RELATIVE TO THE 30-YEAR MEAN, 2014

11. In 2014, the facility was restructured into a segregated portfolio company (SPC) to facilitate expansion into new products and geographic areas and is now named CCRIF SPC.

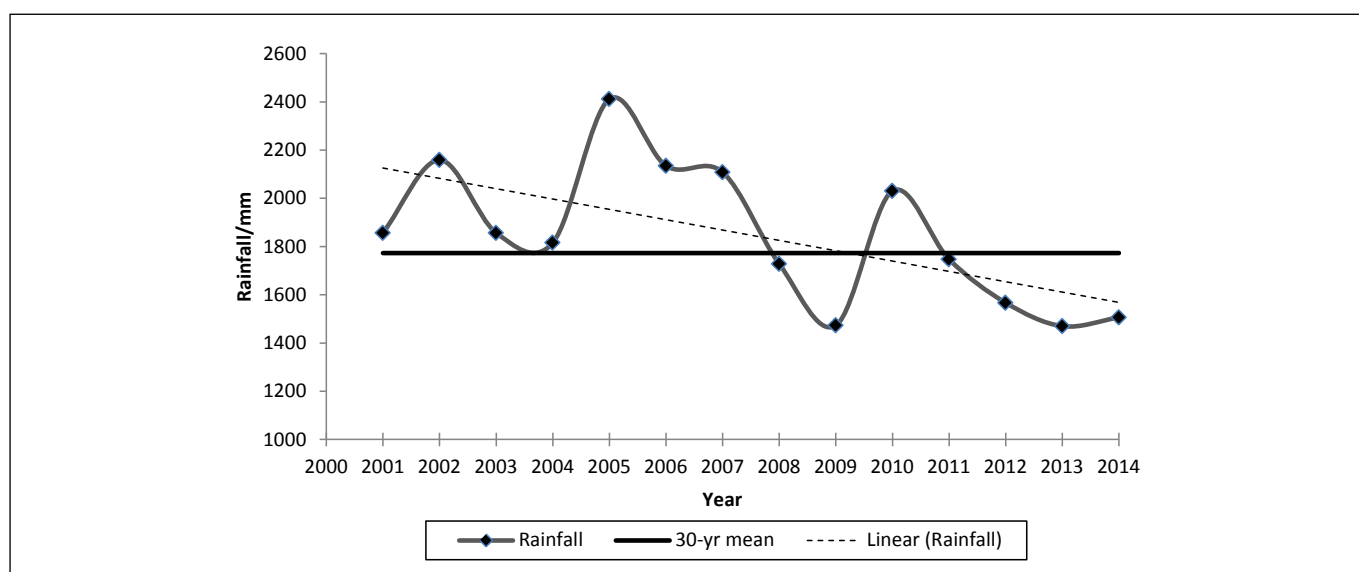


FIGURE 3C: AVERAGE ANNUAL RAINFALL, 2001–2014

Climate

The country experienced annual rainfall of 1 506mm, approximately 36mm (2.4 per cent) higher than in 2013, but 267mm (15.1 per cent) less than the 30-year mean¹². The mean annual rainfall for each parish was below the 30-year mean (Figure 3B). The highest percentage change (60.4 per cent) was observed in Clarendon, followed by St Thomas (54.6 per cent) and Kingston and St Andrew (26.3 per cent). A review of rainfall pattern over the period 2001–2014 showed a generally declining trend, despite the occurrence of storm events (an average of one per year between 2001 and 2012).

Climate parameters are monitored by the Meteorological Service Jamaica.

Based on the average meteorological drought indices, the country as a whole experienced severe drought for the June/July period when it received 15.1 per cent less rainfall relative to the 30-year mean (Table 3.3). St Mary (4.0 per cent), Clarendon (6.0 per cent) and St Thomas (8.0 per cent) were particularly hard hit as they experienced extreme drought during this period. Twelve parishes recorded drought in the June/July period. Clarendon was the worst affected parish with two periods of extreme, three severe and four normal

TABLE 3.3
DROUGHT INDICES BY PARISH, 2014

Parishes	Dec/Jan	Jan/Feb	Feb/Mar	Mar/Apr	Apr/May	May/June	June/July	July/Aug	Aug/Sep	Sep/Oct	Oct/Nov	Nov/Dec
Kingston and St Andrew	73	75	60	71	102	77	21	99	110	70	73	75
St Thomas	100	99	67	57	70	44	8	48	62	34	44	54
Portland	108	92	48	55	78	70	26	56	114	81	75	59
St Mary	90	61	28	50	76	53	4	48	81	54	80	63
St Ann	108	69	40	61	97	87	33	82	130	91	82	59
Trelawny	64	68	54	98	163	123	48	88	116	107	87	37
St James	121	152	107	142	149	104	59	96	108	93	90	49
Hanover	99	132	90	117	139	94	41	67	87	68	65	50
Westmoreland	77	150	123	125	146	99	56	75	94	90	79	52
St Elizabeth	53	87	106	111	106	78	46	69	77	73	84	81
Manchester	112	144	117	82	79	53	27	90	90	55	63	72
Clarendon	85	100	88	57	24	17	6	40	46	37	51	55
St Catherine	79	108	89	66	99	86	50	92	102	67	84	95
Jamaica	94	97	72	83	104	78	35	72	92	70	72	60

Note: Extreme drought: 0–20%; Severe drought: 21–40%; Normal drought: 41–60%; No drought: 61% and over (of the 30 yr mean). Numbers rounded to the nearest whole number.

Source: Meteorological Service Jamaica

12. The 30-year mean is an average of rainfall over the period 1971–2000.

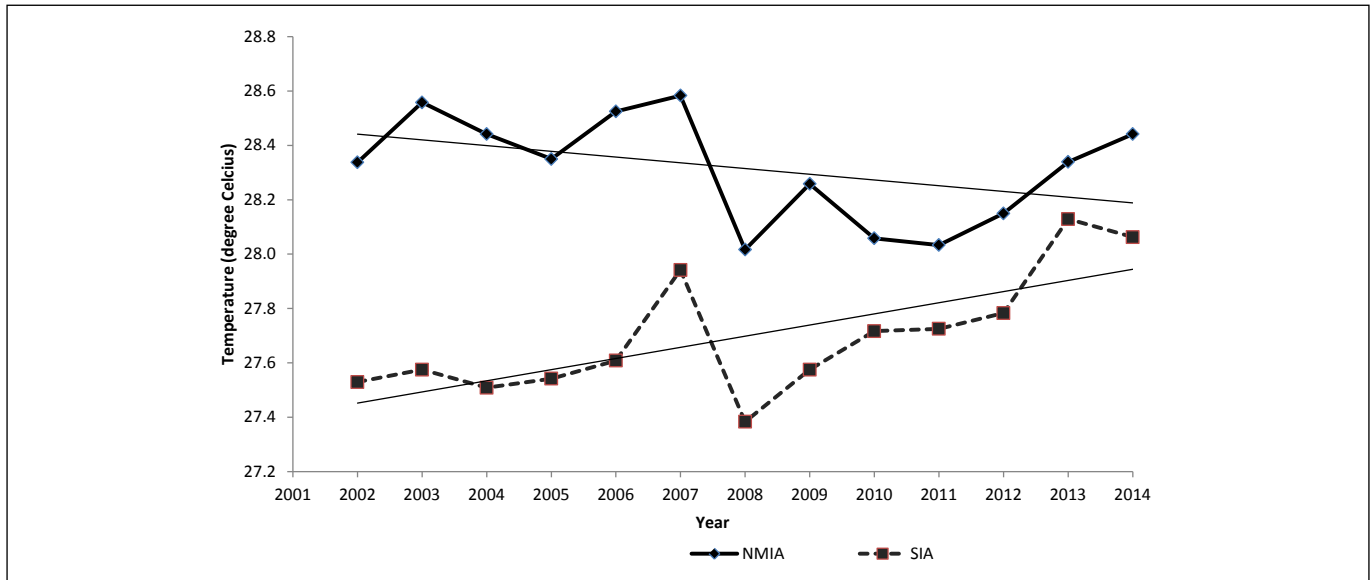


FIGURE 3D: TEMPERATURE AT THE NMIA AND SIA, 2002–2014

periods of drought. St Thomas was the second worst affected parish, recording seven instances of drought. The drought affected the production of water by the National Water Commission, resulting in a decline of 0.6 per cent of water produced relative to 2013 (see chapter on Energy, Electricity and Water).

Consistent with the overall drought conditions, agricultural drought (defined as a period when soil moisture is inadequate to initiate and sustain plant growth) was experienced during varying period during the year. Details of the impact of the drought on the agriculture sector are in the Hazard section of this chapter also in the chapter on Agriculture.

The average annual temperatures at the Normal Manley International Airport (NMIA) and the Sangster International Airport (SIA) were 28.4°C and 28.1°C, respectively (Figure 3D). The average temperature at SIA was similar to the previous year as being the highest on record since 1992. The temperature at the NMIA was the third highest on record since 1992 and the fourth consecutive increase. Overall temperatures have been increasing in the past decade, with 2008 being an exception due to a moderate La Niña phenomenon¹³.

Climate Change

Climate change activities at the national level were coordinated mainly by the Climate Change Division, MWLECC. Among the activities undertaken were the operationalisation of a Climate Change Focal Point Network comprised of

government ministries, departments and agencies (MDAs), and public education and awareness activities. The CCD also contributed to climate change negotiations under the UNFCCC and led in the implementation of the GOJ/GEF/UNDP Third National Communication (TNC) and Biennial Update Report (BUR) to the United Nations Framework Convention on Climate Change (UNFCCC) Project¹⁴. The BUR will assess the country's greenhouse gas (GHG) emissions for 2010 whilst the TNC will assess national circumstances including sector-specific vulnerability, gaps, constraints and capacity needs; it will also include an abatement assessment and propose recommendations for climate change mitigation and adaptation.

Implementation of the GOJ/Adaptation Fund “Enhancing the Resilience of the Agriculture Sector and Coastal Areas for Livelihoods Protection and Food Security” Programme continued. Among the achievements were:

- the establishment of eight rainwater harvesting systems using roof catchment tanks
- and the installation of 26 (1/4 acre) gravity drip irrigation systems
- the establishment of six Water User Groups
- the establishment of five demonstration plots and the training of over 1 000 farmers in effective land husbandry practices

13. NOAA defines the La Niña as “cooler than normal sea-surface temperatures in the central and eastern tropical Pacific ocean that impact global weather patterns”.

14. The BUR and TNC are expected to be completed by 2015 and 2017 respectively.

- the hosting of Basic Disaster Risk Reduction Management and Community Disaster Risk Management training in two Westmoreland communities
- the completion of a storm surge modelling and sea level rise scenario report
- the preparation and approval of an environmental impact assessment for the construction of breakwater structures to protect the Negril shoreline
- two Gender and Climate Change training workshops for executing entities of the programme in partnership with the Gender and Development Studies, University of the West Indies (UWI).

The project preparation phase of the “Improving Climate Data and Information Management Project” under the Pilot Programme for Climate Resilience (PPCR) was completed. It facilitated the development of “Near-term Climate Scenarios for Jamaica” (up to 2040) with special focus on the Rio Minho and Rio Bueno-White River Watersheds, and the training of selected stakeholders across the public and private sectors and NGOs on integrating these scenarios in planning.

The “Adaptation Program and Financing Mechanism for the PPCR” (Investment Projects 2 and 3) was approved by the IDB in December 2014 with financing of US\$17.9 million in loan and grant funds. The project was the first adaptation programme to be approved under the PPCR of the Climate Investment Funds (CIF). It is aimed at increasing Jamaica’s resilience to climate change by enhancing the adaptive capacity of the agriculture and tourism sectors as well as watershed management and provision of climate financing for adaptation at the community level.

The awareness raising initiatives under the PPCR included the distribution of educational materials on climate change across three communities. These materials included fact sheets, promotional items, comic books, a 30-minute docu-feature video, and updating of the Climate Change Handbook for Journalists. Jamaica co-hosted the Climate Investment Funds 2014 Forum and associated meetings, which was held from June 23–24 in Montego Bay under the theme “Learn, Share, Network”. The event brought together over 500 stakeholders from 50 countries, NGOs, indigenous groups and other partners across the CIF community. Representatives from various MDAs contributed to raising awareness of Jamaica’s climate change policy framework and adaptation

initiatives through the delivery of technical presentations and the preparation of multi-media material for the Forum’s Knowledge Bazaar.

Forestry Resources

The country’s forestry resources are managed by the Forestry Department (FD) in accordance with the Strategic Forest Management Plan 2010 to 2014. Activities undertaken during the year were related to the management of forestry resources, reforestation, compliance and enforcement, and public awareness.

Advances were made in the Planning and Policy and Legislative Framework governing forestry resources. The new Forest Policy (2014)— an update to the Forest Policy 2001— was approved by Cabinet in December. Forest management plans for the Stephney-Johns Vale Forest Reserve, St Ann, and Windsor Castle Forest Estate, St Thomas, were completed under the GOJ/GEF/UNDP National Protected Areas Project. These plans are required under the Forestry Act, 1996 for Forest Reserves and Forest Management Areas (FMAs) and have been submitted to the MWLECC for final approval.

A Sawmilling Licensing Registration Programme was established during the year, wherein persons involved in the production, trade or storage of local lumber will be required to obtain permits prior to operating. The launch of the programme took place in September, and three sensitization sessions were conducted. The formal application system commenced in October, following which, 18 applications were submitted for processing.

Forest Reserves and FMAs are declared under the Forest Act, 1996 to enhance the management of forest resources¹⁵. Eleven new FMAs were declared in 2014. The designation of 13 new Forest Reserves advanced following the gazetting of the proposed areas and a 90-day period for public comments. The total area covered by the FMAs and proposed Reserves was 3 125 hectares (ha).

A Land Use Change Analysis (LUCA) was conducted using high resolution satellite imagery¹⁶ and improved processing technology. The results showed that despite a national increase in forest cover, there were reductions in the Broadleaf and Open Dry forest classifications of 0.2 and 7.2 per cent per annum, respectively. This reflects an overall decline in the quality of forests. Five additional land use classes were identified in the LUCA, 2013 relative to the 1998 assessment. Secondary Forests¹⁷ contributed to the increase in total forest cover; about a third of this was real conversions

15. Forest Management Areas (FMAs) are declared by the Minister with responsibility for Forestry. Forest Reserves are approved by Parliament. Forest Estates which are not declared under the Forest Act, 1996 are managed under the Forest Regulations, 2001 which have lesser penalties for breaches.

16. The imagery was purchased under the GOJ/EU/UNEP Climate Change Adaptation and Disaster Risk Reduction Project which ended in December 2013.

17. Secondary Forests is a new classification categorized by having over 75 per cent Broadleaf Forests with about 15.0 to 25.0 per cent disturbance.

while the remainder was from improved technology. Bamboo was reclassified as non-forest and therefore not included in the total forest cover. Trelawny, Portland, St Ann and St Catherine accounted for the largest share of forest cover. Loss in forest cover was more evident in St Ann, Hanover and Clarendon. The greatest gains, due mainly to Secondary Forest, were observed in St Mary, St Thomas and Manchester.

Many of the activities in the sustainable use and management of forestry resources were supported by the GOJ/USAID Jamaica Rural Economy and Ecosystem Adapting to Climate Change (JaREEACH) Project, the objective of which is to build local level capacity in climate change adaptation with special focus on the agriculture sector. Achievements during the year included:

- the reforestation of 172 ha of lands in the Stephney-John's Vale Forest Reserve, St. Ann
- establishment of seven demonstration plots for sharing best practices among farmers
- distribution of 6 151 timber and 13 348 fruit seedlings to selected communities as part of an agro-forestry programme
- expansion of local level capacity in forestry management through the training of 285 farmers in agro-forestry and the hosting of nine community workshops on topics such as fire prevention, plant nutrition and productivity, and chemical use and safety in partnership with non-governmental organisations and community-based organisations (CBOs)

Five Local Forest Management Committees (LFMCs) were launched, bringing the total to 18. The new LFMCs are Spring Dunrobin and Hillside, St Thomas, and Grants Mountain, Hessen Castle and Stephney Johns Vale, St Ann. The latter three were supported by the JaREEACH project.

The number of new farmers registered to the Private Forestry Programme (PFP) increased for the third consecutive year. A total of 824 new farmers were registered compared with 698 in 2013. The total number of registered farmers as at the end of the year was 4 621. Three hundred and seventy farmers received 33 468 seedlings (equivalent to 54 ha), this compared with 502 farmers receiving 92 576 seedlings (equivalent to 184 ha) in 2013. The FD undertook an inaugural monitoring programme to assess the impact of the PFP. Field visits to 601 farmers were conducted which revealed that Block¹⁸; Agroforestry¹⁹; and Block and Line²⁰ Planting were the most widely used methodologies for

planting the seedlings, accounting for 37.0, 19.0 and 12.0 per cent, respectively.

Monitoring and enforcement activities of the FD resulted in 104 Notices to Quit and Notices of Contraventions being served. A total of 141.4 m³ of lumber valued at \$1.0 million was harvested, a decrease of 346.5 m³ and \$1.3 million relative to 2013. This comprised 44.8 m³ of Caribbean Pine and 96.6 m³ of Hardwood trees, reflecting declines of 164.6 m³ (78.6 per cent) and 181.9 m³ (65.3 per cent), respectively.

Public education and awareness raising activities were conducted during the year. The FD staged its annual Forest Trek from Schwallenburgh, St. Ann to the Holly Mount Great House, St. Catherine with 471 participants planting 250 seedlings. The hike was staged to build awareness of forest resources among Jamaicans. National Tree Planting Day was held in October under the theme "Adapting to Climate Change – Secure Our Future, Plant a Tree Today", and some 9 200 seedlings were distributed.

Coastal and Marine Resources

The Coral Reef Health Index (CRHI) was determined for coral reef ecosystems at 20 sites in 11 locations (Table 3.4). The overall score remained at 2.1 and is characterised as fair. Three locations were ranked as poor and the remaining as fair. The lowest ranking location (1.3) was the Port Royal Protected Area where all parameters monitored were either in a poor or critical state. The highest ranking location was Sandals Boscobel Special Fishery Conservation Area which ranked "good" for hard coral and nutrient-indicating algae (NIA) and "very good" for Diadema, but was "fair" overall given the conditions of the other parameters. The volume of commercial fish at all locations was critically low. The status of coastal and marine resources is monitored by the National Environment and Planning Agency (NEPA).

Beach profiles of 35 sites (across six parishes) were assessed by NEPA (Table 3.5). There was overall accretion of 6.0 per cent in beach width compared with 2013. Kingston and Trelawny were the parishes which experienced net erosion (5.8m and 1.3 m, respectively). Erosion was mild²¹ at all the sites which experienced net erosion, the majority (72.7 per cent) of which were in the Palisadoes-Port Royal Protected Area.

Water quality monitoring was conducted at 22 sites for nitrates, phosphates, biological oxygen demand (BOD) and faecal coliform levels. Half of the sites had concentrations of nitrates above acceptable levels. The majority of sites had concentrations of phosphates and BOD above acceptable

18. Block planting is to plant seedlings in areas where forests did not previously exist.

19. Agroforestry planting is filling the gaps in existing secondary forest areas.

20. Line/alley planting occurs when trees are planted between agricultural crops and other tree species.

21. Erosion is considered mild when less than 25.0 per cent relative to the previous reporting period.

**TABLE 3.4
CORAL INDEX AND REEF BIOTA INDEX, 2014**

	CORAL INDEX		REEF BIOTA INDEX				CRHI
	HC (%/100m ²)	Recruits (#/m ²)	NIA (%/100m ²)	Herbivorous	Commercial	Diadema (#/m ²)	
				fish (g/100m ²)	fish (g/100m ²)		
Blue Lagoon (Portland)	14.2	n/a	38.8	1 495.4	135	n/a	2.3
Oracabessa Bay Special Fishery Conservation Area	18.3	0.2	34.2	1 464.3	621.6	0.67	2.2
Sandals Boscobel Special Fishery Conservation Area	33.4	0.2	10	159.4	245.6	2.681	2.7
Ocho Rios Marine Park	16.9	0.3	28.4	1 071.1	289.7	1.121	2.2
Discovery Bay	14.7	0	45.8	1 993.5	164.8	0.163	1.7
Falmouth	22.8	1	28.8	1 714.1	112.1	0.724	2.3
Montego Bay Marine Park	24.8	0	22.9	1 900.9	440.2	0.867	2.3
Hopewell - Green Island (Hanover)	20.6	0.1	35.1	1 431.3	133.6	0.578	2.3
Negril Marine Park	18.3	1.6	38.5	2 220.7	408.5	0.53	2.2
Sandals Whitehouse Special Fishery Conservation Area	17.5	0.5	25.6	1 033.3	23.9	0.398	1.8
Port Royal Protected Area	7.5	0	40.8	618.2	111.1	0.203	1.3
Mean	19	0.4	31.7	1 372.9	244.2	0.8	2.1

CRHI Note: Critical: 1.0–1.8; Poor: 1.9–2.6; Fair: 2.7–3.4; Good: 3.4–4.2; Very good: 4.3–5

HC - Hard Coral Cover

NIA - nutrient indicating algae

CRHI - Coral Reef Health Index

n/a - not available

Source: NEPA

KEY:

CORAL INDEX	VERY GOOD (5)	GOOD (4)	FAIR (3)	POOR (2)	CRITICAL (1)
Coral Cover (%)	≥40	20.0–39.9	10.0–19.9	5.0–9.9	<5
Coral Recruitment (#/m ²)	<0.2	0.2–0.5	0.5–0.69	0.7–0.9	≥0.9
REEF BIOTA INDEX					
Macroalgae Cover (%)	<10	10.0–19.9	20.0–39.9	40.0–59.9	≥60
Herbivorous Fish Abundance (g/100m ²)	≥4 800	3 600–4 799	2 400–3599	1 200–2 399	<1200
Commercial Fish Abundance (g/100m ²)	≥2 800	2 100–2 799	1 400–2099	700–1 399	<700
Diadema abundance (#/m ²)	>2.5 (and <~7)	1.1–2.5	0.5–1.0	0.25–0.49	<0.25

levels. More than half of the sites had acceptable levels of faecal coliform for most of the year. Sites in St. Mary fared the best, having acceptable levels of all parameters for most of the year. Clarendon was the worst as all sites had consistent levels of all parameters above acceptable levels.

The Urban Development Corporate (UDC) developed the facilities at the Pearly Beach West, St Ann for public activities with special attention to the nesting of sea turtles in partnership with selected stakeholders in the Oracabessa Fish Sanctuary, St Mary. The UDC also facilitated the construction of the Forum Fishing Village in St Catherine for fisher folk in the area.

Water Resources Management

Surface and ground water resources were monitored and regulated by the Water Resources Authority (WRA). There

were 1 169 streamflow measurements compared with 1 395 in 2013. Groundwater level measurements totalled 3 240, eight fewer than in 2013. Analysis of the data showed that streamflow in Clarendon, St. Catherine, Portland and St. Thomas was lower than the 2013. This is directly linked to the drought conditions in these parishes, of which Clarendon experienced the most severe and extended periods of drought (see section on Climate). Zero flow²² was observed during the dry seasons at all 64 gauging stations monitored. There were no flood events recorded during the year.

Ground water resources remained relatively unchanged due to the managed allocation and abstraction of water by the WRA through a permits and licenses system. To this end, permits were granted for 71 abstraction renewals, 68 new abstraction and 13 drill permit licenses. Some 145 new and renewed licences and two drill permits were issued in

22. Zero flow measures the level at which there will be no flow recorded the stream.

TABLE 3.5
BEACH EROSION ACROSS 35 SITES, 2013–2014

Parish/Localities	No. Sites	Cumulative Mean Beach Width (m), 2013	Cumulative Mean Beach Width (m), 2014	% Change, 2013–14
Portland	5	21	23.2	10.8
Kingston	9	49.5	43.7	-11.6
Trelawny	2	20.2	18.9	-6.4
Westmoreland (Other)	2	13.6	16.8	23.2
Negril (Hanover/Westmoreland)	15	27.1	32.3	19.1
Clarendon	2	22.2	27.9	25.4
Average Width		25.6	27.1	6.0

Source: NEPA

2013. Ground water resources were used to provide water for domestic and irrigation purposes, particularly in drought-affected areas.

Assessments of water resources were undertaken on the following:

- the Orange/Fish River Catchment area to determine potential climate change impacts on water resources against the demand of the surrounding population and the tourism sector. The results of the assessment will assist the National Water Commission (NWC) to provide adequate amounts of water to the Negril area
- the impact of remediation activities in the bauxite industry on water resources, including the installation of a waste disposal system for the stacking and drying of mud in Ewarton, St. Catherine, and the dewatering and rehabilitation of the Mt Rosser Red Mud Lake, St. Catherine. Sodium levels at Rio Hoe and the Walkerswood well in St. Ann improved, with concentrations decreasing from 395 mg/L and 66 mg/L to 32 mg/L and under 30 mg/L, respectively.

The NEPA conducted water quality measurements at 25 rivers. Data showed varying results with respect to phosphates, nitrates, BOD and faecal coliform. All the sites had levels of nitrate within acceptable levels for most of the year. The situation was similar for phosphates, except for one case which exceeded acceptable levels for most of the year. With respect to BOD and faecal coliform, about 60.0 per cent and 80.0 per cent of the sites respectively exceeded acceptable levels. The Rio Bueno/White River and Martha Brae Rivers had the best quality overall, where all four parameters were within acceptable levels for most of the year. The Rio Cobre had the worse overall quality as most sites exceeded acceptable levels for all parameters, except nitrates.

Jamaica's capacity to conduct water quality monitoring using isotope hydrology and dye tracing techniques was

enhanced through training and the acquisition of material and equipment. Staff of the WRA was trained in Karst Hydrology and Dye Tracing Techniques. Equipment obtained included a fluorometer, rhodamine and fluoresceine dye for artificial tracer activities, a spectrofluorometer for low-cost water quality analysis, and field water quality meters. This initiative was supported by the International Atomic Energy Agency (IAEA).

Biodiversity

Relative abundance of Game Birds is assessed by NEPA to inform the annual hunting season and any likely impact hunting may have on the Game Bird population. Based on data collected from February–June, detectability was 58 birds per hour (relative to 52 birds per hour in 2013) of which 32 were White-crowned Pigeon (*Patagioenas leucocephala*), 20 were White-winged Dove (*Zenaida asiatica*), and 6 were Zenaida Dove (*Zenaida aurita*). The Mourning Dove (*Zenaida macroura*) was not observed. Breeding peak was in April. The trends observed in previous years show that the bird populations have remained healthy.

Jamaica is party to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), a legally binding agreement which guides the international trade of species. In keeping with the agreements of the Convention, 160 permits and certifications were issued by NEPA, a 23.1 per cent increase relative to 2013 (Table 3.6). Permits for the trade of Queen Conch and Orchids were the most frequently requested.

In an effort to conserve the Jamaican Iguana, the UDC, UWI and the Hope Zoo partnered to release 30 animals, adding to the estimated population of 200 in the wild. The iguanas are among the world's most critically endangered species according to the IUCN Red List of Threatened Species²³.

The "Mitigating the Threats of Invasive Alien Species (IAS)" project was completed resulting in the finalisation

23. <http://www.iucnredlist.org/details/6027/0>

TABLE 3.6
APPLICATIONS PERMITS AND CERTIFICATES ISSUED UNDER CITES, 2013–2014

Month	2013		2014	
	Number of Applications Approved	Species (Common names)	Number of Applications Approved	Species (Common names)
January	15	Orchids	24	Orchids and watch bands made from American Alligator skins
February made	3	Orchids	10	Orchids, Queen Conch meat and watch bands from American Alligator skins
March	1	African Grey Parrot	32	Orchids, Queen Conch meat, opercula and Jamaican Iguana blood
April	2	Iguana blood, Birds and Orchids	13	Orchids, Queen Conch meat and Yellow-headed Parrot
May	19	Orchids	26	Orchids, Spider Monkey, bird feathers and skins
June	3	Orchids, African Lion	2	Bottlenose dolphins and Bengal tigers
July	15	Queen Conch meat, Jamaican Slider, Snakes and Orchids Queen conch meat, crocodile tissue, Orchids, monkey, toucan,	2	Queen Conch and frog specimens
August	16	Jamaican Boa skin clippings, Bobcat and Serval	12	Queen Conch meat and Orchids
September	30	Queen Conch meat, manatee liver tissue, Bottlenose dolphins, Orchids, assorted plants	7	Queen Conch meat and shells
October	18	Queen Conch meat, Orchids	14	Queen Conch meat and opercula, Yellow-billed and Black-billed Parrots blood
November	6	Orchids	6	Queen Conch meat
December	2	Yellow-naped Parrot, Queen Conch and Orchids	12	Orchids, Frogs and Red-billed Streamer tail
TOTAL	130		160	

Source: NEPA

of the National Invasive Alien Species Strategy and Action Plan (NIASSAP). Other activities included the development of a Lionfish Adaptive Management Plan; Establishment of the Marine IAS Lab (and lionfish research programme) at the UWI Discovery Bay Marine Lab, St. Ann; and continued public education on IAS. The implementation of the NIASSAP will be overseen by the National Invasive Alien Species Working Group.

Management of Chemicals, Waste and Pollution

The National Solid Waste Management Authority (NSWMA) estimated the total volume of waste disposed of at the four wastesheds at 672 046.0 tonnes²⁴. The per capita waste generation is therefore estimated to be 1.0 kg/day²⁵, a 0.1 kg/day decrease relative to 2013²⁶. The Metropolitan Parks & Markets (MPM) Wasteshed received 390 584.5 tonnes; the North-eastern Parks & Markets (NEPM) Wasteshed 50 915.5

TABLE 3.7
RESULTS OF WASTE CHARACTERISATION OF THE WPM WASTESHED, 2014

Waste Fraction	Percentage
Compostable	55
Plastics	18
Paper	17
Textile	4
Glass	3
Cardboard	2
Metal/ Tin	2
Wood/ Board	0
E-waste	0
Hazardous	0
Other	0
Total	100

Source: NSWMA

24. This includes domestic waste and some commercial waste at sites managed by the NSWMA.

25. The estimated population of persons using formal collection systems in the Jamaica Survey of Living Conditions (JSLC) 2012.

26. The 2013 estimate is revised taking into account the proportion of the population using formal collection systems (JSLC 2012) instead of the entire population.

TABLE 3.8
ITEMS COLLECTED AT
THE ANNUAL COASTAL CLEAN-UP DAY, 2014

Items	Number of Items
Beverage Bottles (Plastic)	177 794
Bottle Caps (Plastic)	63 011
Other Plastic Bags	26 416
Cups & Plates (Plastic)	19 075
Food Wrappers (candy, chips, etc.)	16 541
Beverage Bottles (Glass)	16 263
Cups & Plates (Foam)	14 161
Other Plastic/Foam Packaging	12 514
Other Plastic Bottles (oil, bleach, etc.)	12 503
Forks, Knives, Spoons	12 096

Source: Jamaica Environment Trust

tonnes; the Southern Parks & Markets (SPM) Wasteshed 77 324.0 tonnes; and the Western Parks & Markets (WPM) Wasteshed, 153 222.0 tonnes.

- A waste characterisation study for the WPM Wasteshed was carried out during the year (Table 3.7). The results showed that the majority (55.0 per cent) of the waste was compostable. Plastics (18.0 per cent) and paper (17.0 per cent) were the second and third largest categories, respectively.

The Government of Jamaica in partnership with the Inter-American Development Bank (IDB) hosted the Inaugural Caribbean Conference on Solid Waste Management from September 30–October 3 in Montego Bay, St. James. The conference was staged under the theme, “Solid Waste Management: A National Development Imperative”. The

over 100 participants included public and private sector, academia, and civil society representatives from across the wider Caribbean. Among the topics of discussion were policy, legal and institutional frameworks to modernise solid waste management; waste recovery and recycling – Options for the Caribbean; determining the economic and financial costs of solid waste management; and the link between solid waste and poverty. The conference revealed that most countries face similar issues related to the need to strengthen policy, legislative and institutional frameworks for solid waste management; establish a sustainable financing mechanism; and implement greater public education. A Draft Resolution was prepared which outlined key principles that will underpin the framework for action to address these issues.

The annual Coastal Clean-up Day took place in September. Some 85 766 pounds (lbs) of garbage was collected along 101 miles of the coast, filling 5 970 trash bags. Plastic items were the most prevalent (Table 3.8). Plastic beverage bottles accounted for 39.3 per cent of the waste collected.

The National Solid Waste Management Authority (NSWMA) conducted a Clean Schools Competition during the year to raise awareness of waste management among school children. Some 152 schools entered and prizes were awarded in several categories including Parish Winners, as well as regional prizes²⁷. The NSWMA spearheaded an initiative to roll-out a plastic separation programme across government entities in the Kingston and St. Andrew area.

The monitoring of air quality was conducted by tracking particulate matter at five sites: four in St. Andrew and one in St. Catherine (Table 3.9). The results show that in 2014, both sites in St. Catherine had annual averages above the Air Quality Standard²⁸ for Jamaica.

TABLE 3.9
MEAN CONCENTRATION AND 24-HOUR STANDARD EXCEEDANCE
FOR PARTICULATE MATTER AT SELECTED SITES, 2013–2014

Site	Parish	2013		2014	
		Annual Average ($\mu\text{g}/\text{m}^3$)	Frequency of 24-Hour Exceedance	Annual Average ($\mu\text{g}/\text{m}^3$)	Frequency of 24-Hour Exceedance
Cross Roads	St Andrew	43.4	1	42.5	0
Old Hope Road		43.7	0	35.3	0
Washington Gardens		61.6	0	a	2
Spanish Town Road		n/a	n/a	66	0
Portmore	St Catherine	52.9	1	50.7	0

a - Annual average could not be determined

n/a - Not available

Source: NEPA

27. These include Western Parks and Markets; Southern Parks and Markets; North Eastern Parks and Markets; and the Metropolitan Parks and Markets.

28. Annual average, max concentration of 50 $\mu\text{g}/\text{m}^3$

TABLE 3.10
NUMBER OF POLLUTION INCIDENTS, 2013–2014

Location	2013	2014
Kingston and St Andrew	60	40
Other Parishes	22	41
Total	82	81
Total No. of Closed Cases	22	12

Source: NEPA

NEPA continued to track pollution incidents supported by a new database. A total of 81 incidents were reported in 2014 compared with 82 in 2013; Kingston and St. Andrew accounted for 49.4 per cent (Table 3.10). Most of the incidents were related to air pollution (37), oils spills (13) and general spills (10). The remaining incidents were related to fish kills, sewage odours and discharge, water pollution and others.

In keeping with obligations under the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal, NEPA processed nine Transboundary Movement Applications, all of which were approved. In the previous year, 15 applications were submitted, of which seven were processed and approved. Under the Convention, States are encouraged to reduce the production and unethical transfer of hazardous waste to other States as well as minimize the associated potential environmental and health implications.

The UDC facilitated the construction and operation of sewage treatment plants in Dunns River, St Ann and Caymanas Estate, St Catherine. This is expected to improve environmental conditions in surrounding areas.

Land Resources

The efficient management of land resources during the year focused on the areas of development applications and management; squatter management and containment; and the processes of land titling and divestment. Enforcement efforts for land developments were also continued and contributed to greater compliance amongst developers.

Development Applications and Management

During 2014, NEPA received a total of 2 243 development applications, representing a 25.9 per cent increase relative to the previous year (Table 3.11). Subdivision applications for development on less than 10 lots accounted for the largest share of applications received (35.5 per cent) and processed (34.2 per cent). This was also reflected among approved applications as 48.6 per cent were for subdivisions of this nature. Of the number of applications received, 97.1 per cent was processed, which was an improvement compared with 2013. Of the total applications processed, 83.8 per cent (1 826) was processed by the entity within the targeted 90-day period, with approximately three-quarters of these being processed within a 60-day timeframe. Some 63.7 per cent of the applications that were processed were approved for development, a 3.0 percentage point reduction relative to the previous period.

The overall improvement in expediting the processing of applications is partly due to the activities at the Development Applications Centre (DAC) at NEPA. The Centre, which was established in 2010 to strengthen the applications process, provided pre-application consultation services for 408 clients. This included the review of 117 development proposals, a 24.0 per cent increase compared with 2013. The DAC contributed to a two-fold increase in the number of applications received by NEPA (81). The Centre also responded to 85 of the 92 proposals received from clients within the standard 14 days of meetings or 14 days of receipt. The average response time was just over 9 days.

There was an increased demand for environmental licences (EL) representing more than twice the number of the previous year and 23.9 per cent of applications, compared with 8.1 per cent in 2013. The increase is likely to be related to the requirements of the Wastewater and Sludge Regulations which were published in 2013 under the Natural Resources Conservation Authority (NRCA) Act. Among the EL applications processed (429), 84.1 per cent was processed within 90 days, and 51.5 per cent of those processed were subsequently approved. The applications for environmental permits increased slightly, accounting for 16.3 per cent of

TABLE 3.11
DEVELOPMENT APPLICATIONS RECEIVED AND PROCESSED, 2014

Application Type	Received	Processed	Processed in 90 days	Processed in 60 days	Approved
Planning	291	300	198	123	128
Subdivision	908	900	855	742	737
Environmental Permit	365	396	282	211	254
Environmental License	536	429	361	198	221
Beach License	143	154	130	71	48
Total	2243	2179	1826	1345	1388

Source: National Environment and Planning Agency

total submissions, and 18.3 per cent of approved applications. The NEPA also improved monitoring and enforcement of land use developments which contributed to an increase in the submission of applications for beach licences as well as planning applications.

Local Authorities received a total of 5 454 subdivision and building/planning applications, a 6.6 per cent reduction compared with the previous year (Table 3.12). The majority (88.6 per cent) of these were building/planning applications. This reflected a 7.0 per cent decline relative to 2013. Clarendon, St. Ann and the Municipality of Portmore recorded declines for building/planning applications, while the Kingston and St. Andrew Corporation (KSAC) received 49.8 per cent more applications compared with 2013. The latter accounted for the largest percentage (16.9 per cent) of all applications received in this category. The St. Catherine Parish Council, with 665 applications recorded the second largest increase in building/planning applications.

Among the building/planning applications received, 4 824 were approved. Approvals for the KSAC and the St. Mary Parish Council, both surpassed the total applications received. This was likely due to the processing of applications which were backlogged in the system. Of the applications received, 78.6 per cent was approved within the 90-day timeframe.

The majority (84.0 per cent) of building/planning applications submitted to the Local Authorities were for residential developments. The St. Catherine Parish Council

was in receipt of the largest share of these, with some 625 applications representing 15.4 per cent of the total. The KSAC accounted for 12.5 per cent. The Councils in Hanover and St. Thomas received the least number of residential development applications, amounting to 1.3 per cent and 3.2 per cent, respectively. Applications for commercial development (at 341) accounted for 7.1 per cent of those received. This was largest in the Metropolitan areas of Kingston and St. Andrew, and St. James. Institutional development and advertisement applications accounted for 2.8 per cent and 1.4 per cent, respectively. Advertisement applications were submitted solely to the KSAC. Other categories for building/planning applications included mix-use, industrial, resort, recreational and the establishment of cell towers (see Table 3.12).

Subdivision applications represented 11.4 per cent of the total development applications received by Local Authorities, a decline of 3.4 per cent compared with 2013. Of the total subdivision applications received, 47.2 per cent was approved; of which 3.4 per cent was approved within 90 days. The largest percentage of subdivision requests were received by the Local Authorities in Manchester (14.1 per cent), St. Ann (13.3 per cent) and St. Catherine (12.7 per cent). Most applications for subdivisions were approved by the St. Catherine Parish Council (28.9 per cent), which also recorded the highest approvals within the 90-day period. The fewest number of subdivision applications were received by the Authorities in Portmore (0.3 per cent) and in St. Thomas (1.4 per cent). At the end of the year, all parishes had outstanding subdivision

TABLE 3.12
NUMBER OF APPLICATIONS RECEIVED AND PROCESSED BY PARISH/MUNICIPALITY, 2014

Local Authorities	Total Building/Planning Applications				Total Subdivision Applications			
	Received	Approved in 90 days	Approved	Still being Processed Outstanding ^b	Received	Approved in 90 days	Approved	Still being Processed Outstanding ^b
KSAC	818	707	1205	43	47	1	23	16
St. Catherine	665	522	524	1	79	6	85	59
Portmore	427	323	365	0	2	0	1	9
Clarendon	451	368	384	5	74	0	22	85
Manchester	399	291	307	20	88	0	45	175
St. Elizabeth	275 ^a	232	232	7	72	0	0	22
Westmoreland	206	132	138	7	40	0	0	136
Hanover	73	58	75	7	13	0	16	27
St. James	311	294	324	2	23	1	24	28
Trelawny	207	174	174	2	38	1	1	3
St. Ann	327	192	259	59	83	1	30	142
St. Mary	299	229	529	10	32	0	3	82
Portland	234	181	208	30	23	0	44	64
St. Thomas	139	92	100	12	9	0	0	10
	4 831	3 795	4 824	205	623	10	294	858

a - Some 268 applications were received in 2013 (revised)

b - Includes applications being processed outside the 90-day timeframe

Source: Ministry of Local Government and Community Development

TABLE 3.13
ENFORCEMENT ACTIONS FOR THE PERIOD 2012–2014

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	Notices Under the Air Quality and Wastewater and Sludge Regulations ^a	Total
2012	65	13	23	6	0	418	76	13	n/a	614
2013	58	22	23	33	0	463	143	33	n/a	775
2014	26	22	11	6	1	592	199	33	14	904

a - First introduced in 2014

Source: National Environment and Planning Agency

applications under review. A number of applications were also closed and refused²⁹, the majority of which occurred at the St. Catherine Parish Council and the KSAC.

Development Applications Project

Reforms to the Development Applications Review Process (DARP) were approved by Cabinet in December, and are to be implemented on a phased basis over the short-, medium- and long-term. These include, inter alia, the Local Authorities being authorized to process subdivision applications of 20 lots or less and under 2 hectares of land, as well as building applications for 20 units or less. The Town and Country Planning Authority (TCPA)/NEPA will be responsible for processing applications for larger developments of 21 lots or more and over 2 hectares, and also those for 21 or more units, for subdivisions and building applications, respectively.

The Application Management and Data Automation (AMANDA) System was implemented in all Parish Councils by the end of the year. The system was also installed in several commenting agencies³⁰ including the Rural Agricultural Development Authority (RADA), National Works Agency, the Water Resources Authority, and the Mining and Geology Division. Training in the use of AMANDA was conducted for all Local Authorities, as well as the Jamaica Fire Brigade and the NSWMA. Use of the system will serve to expedite the review process of development applications.

Enforcement

Enforcement actions carried out by NEPA against illegal developments totalled 904 for the year; a 16.6 per cent increase relative to 2013 (Table 3.13). This increase was most noticeable with respect to the issuance of onsite breach/warning notices which rose to 592, and reflected 65.5 per cent of the total enforcement instruments issued. Fifty-six more warning letters were issued than in 2013. This increase was

likely due to NEPA replacing verbal warnings with warning letters characterized as soft enforcement actions³¹. Use of this instrument might also have influenced a reduction in the number of enforcement notices which decreased by 55.2 per cent. Fewer stop notices and notices of intention to suspend were also issued. For the first time, notices were issued under the Air Quality and Wastewater and Sludge Regulations.

Development Orders and Plans

Preparatory work began on Local Sustainable Development Plans (LSDPs) for the parishes of Westmoreland, St. Catherine, Clarendon, St. Thomas and Trelawny. The St. Elizabeth Parish Council, in association with the St. Elizabeth Parish Development Committee commenced work for a development plan to cover areas outside of the Greater Treasure Beach locale, for which an LSDP was completed in 2013.

Confirmation notices were drafted for the provisional Development Orders prepared for the parishes of Manchester, Portland, Trelawny and for the Negril Green Island Local Planning Area including the resort town of Negril. The draft Development Orders for Kingston and St. Andrew, Clarendon, and St. Thomas were submitted to the Chief Parliamentary Counsel for review, to enable promulgation as Provisional Development Orders. The review process continued for the draft Development Orders of St. Catherine, St James and St. Thomas. The drafting process for the Hanover Development Order is also far advanced.

Land Titling

The Land Administration and Management Project (LAMP) Phases I and II continued to promote the efficient use of land resources for citizens by facilitating increased access to secure tenure. Some 674 applications for titles were lodged at the NLA, 388 fewer than in 2013. A total of 714 titles

29. Applications are closed when outstanding information has not been forthcoming by the developer, and refused when approval has not been granted.

30. Entities which receive applications for review and comments

31. All other instruments are referred to as hard enforcement actions

were issued from first registration applications. The number of cases initiated by clients remained relatively constant at 1 539. Other activities included the completion of 1 550 new surveys, an increase of more than threefold relative to 2013. Some 53 existing survey plans were amended, while a total of 50 survey diagrams were updated by way of surveyors' declarations. A total of 43 persons were also trained and two adjudication committees established to assist in addressing issues that pertain to root of titles.

Land Divestment

The Land Divestment Advisory Committee (LDAC) processed 85 applications (including resubmissions) recommended by the Commissioner of Lands. Of this total, 65 land divestment applications with an estimated value of \$282.4 million were recommended by the LDAC for approval. The LDAC also reviewed and recommended for approval, three divestment applications received from the Ministry of Local Government and Community Development. An estimated \$22.1 million in revenue is expected from these divestments.

Squatter Management

The Secondary Analytical Research on Squatting was completed in July. The report collated and analysed local, regional and international information on squatting and made recommendations for policy considerations in developing the National Squatter Management Policy. Among the findings and recommendations was the need for land management responsibilities to be decentralized from central government, thereby empowering Local Authorities. The Local Authorities are part of the approval process required for regularisation of informal settlements to promote tenure upgrading and regularisation, where feasible. At present, the regularisation of squatter settlements is undertaken mainly by the Ministry with responsibility for housing, along with its affiliated agencies.

Preliminary classification of informal settlements into a typology commenced in eight parishes. The exercise was undertaken by the Squatter Management Unit (SMU) through the use of a three-tiered classification system. Tier one refers to settlement located in extremely hazardous area; pose a serious threat to life and property or impact negatively on natural resources. Tier two is categorized by settlements located in areas earmarked for specifically zoned purposes; while the third tier pertains to settlements located in proximity to vital social or physical infrastructure. The typology provides an objective approach to selecting settlements for interventions such as regularization, relocation or removal. Preliminary data revealed that among the parishes surveyed, approximately 5.0 per cent of illegal settlements are likely to fall within the first tier. An estimated 500 Notices-to-Vacate were issued to occupants of Crown lands by several custodians of government lands while the UDC carried out a successful relocation exercise of occupants of the Forum Fishing Beach in Portmore, St. Catherine.

Natural and Manmade Hazards

Droughts

Drought affected the Agriculture sector and was most severe in the southern parishes encompassing the region of Manchester and St Elizabeth, two parishes that account for approximately 40.0 per cent of Jamaica's domestic agriculture production. In addition to crop losses in the field, the establishment of new crops were also affected. A detailed assessment for one of the worst affected parishes, St Elizabeth, indicated direct crop losses from 303 ha valued at \$27.7 million.

A further 412.0 ha of crops and pastures valued at \$17.6 million was lost to fires occasioned by the dry and windy conditions being experienced. As part of the disaster management planning, RADA was allocated \$50.0 million in the budget to assist in a drought mitigation programme, however, an additional \$30.0 million was disbursed to mitigate the effects of the drought conditions and increase production in those areas with sufficient access to water in order to counter the possible shortfalls in production. A further \$3.0 million was allocated to RADA to assist farmers affected by losses due to fires. The Ministry of Agriculture and Fisheries also formulated a public education programme to promote responsible land clearing practices, especially during dry periods.

TABLE 3.14
NUMBER OF GENUINE FIRE CALLS, 2012–2013

PARISHES	2013	2014	% Change
Kingston and St Andrew	2 476	2 662	7.5
St Thomas	646	599	-7.3
Portland	241	356	47.7
St Mary	336	507	50.9
St Ann	704	1 199	70.3
Trelawny	311	342	10
St James	992	857	-13.6
Hanover	262	187	-28.6
Westmoreland	543	393	-27.6
St Elizabeth	656	722	10.1
Manchester	876	947	8.1
Clarendon	1 094	1 012	-7.5
St Catherine	2 697	2 065	-23.4
Total	11 834	11 848	0.1

Source: Jamaica Fire Brigade

Fires

The Jamaica Fire Brigade indicated that there were 11 848 genuine fire calls, 14 more than in 2013 (Table 3.14). St Ann, Portland and St Mary had the highest percentage increases of 70.3, 50.9 and 47.7 per cent, respectively.

Fires continued to adversely affect lives with an increase in deaths (10.5 per cent to 21), injuries (15.7 per cent to

TABLE 3.15
IMPACT OF FIRE, 2012–2014

Impact	Category	2012	2013	2014
Deaths	Adults	23	14	15
	Children	11	5	6
	Firefighters	0	0	0
	Total	34	19	21
Injuries	Adults	68	44	42
	Children	3	9	2
	Firefighters	13	17	37
	Total	84	70	81
Rendered Homeless	Adults	1 549	1 232	1 390
	Children	859	598	673
	Total	2 408	1 830	2 063

Source: Jamaica Fire Brigade

81) and persons rendered homeless (12.7 per cent to 2 063) (Table 3.15). Deaths among children increased by one relative to the previous year, while there was a four-fold decrease in the number of injuries to this group. Of the total rendered homeless, 32.6 per cent were children. The parishes of Westmoreland, Hanover and Kingston and St Andrew (KSA) reported the most deaths, accounting for 28.6, 23.8, and 19.0 per cent, respectively of the total. KSA recorded the majority of the injuries (61.7 per cent) followed by Hanover (13.6 per cent) and St James (12.3 per cent). Nine hundred and two persons (43.7 per cent) were rendered homeless in the KSA, the highest across all parishes. St James with 221 persons (10.7 per cent) had the second highest. There were no deaths or injuries recorded for the northern parishes of Portland, St Mary, St Ann and Trelawny. These parishes also recorded the lowest percentages of persons rendered homeless.

Non-structural fires continued to account for the highest number of fires (Figure 3E). The majority (64.3 per cent)

were bush fires, which also recorded a 2.5 per cent decrease relative to 2013.

Earthquakes

A total of 222 seismic events were recorded in 2014, four fewer than the previous year (Figure 3F). Three of these were felt, two of which were magnitude 3.1 to 4.0 on the Richter Scale, and the other was magnitude 2.1 to 3.0; local (land-based) in origin and occurred in the county of Surrey. According to the Earthquake Unit, UWI, which monitors seismic and earthquake activities, 68 of the events were local, about one-third of which occurred in the Blue Mountain Block. Regional events were the most frequent (41.9 per cent).

Geological Hazards

Fifteen geo-hazard investigations were conducted by the Mines and Geology Division. Investigations on landslide were conducted primarily in Portland, St. Mary and Clarendon; and for geo-hazards related to land subsidence in the KSA and St Ann. The results suggest that the landslides were rainfall induced, particularly in the Northern parishes.

Disaster Preparedness and Mitigation

The implementation of the Disaster Risk Reduction Framework 2012–2015 continued through the Office of Disaster Preparedness and Emergency Management (ODPEM) and other partners. Among the achievements were:

- the approval of the National Chemical Emergency Response Protocol
- launch of the National Emergency Response Geographic Information Systems Team (NERGIST) and training of volunteers (see section on Spatial Data Management in this chapter).

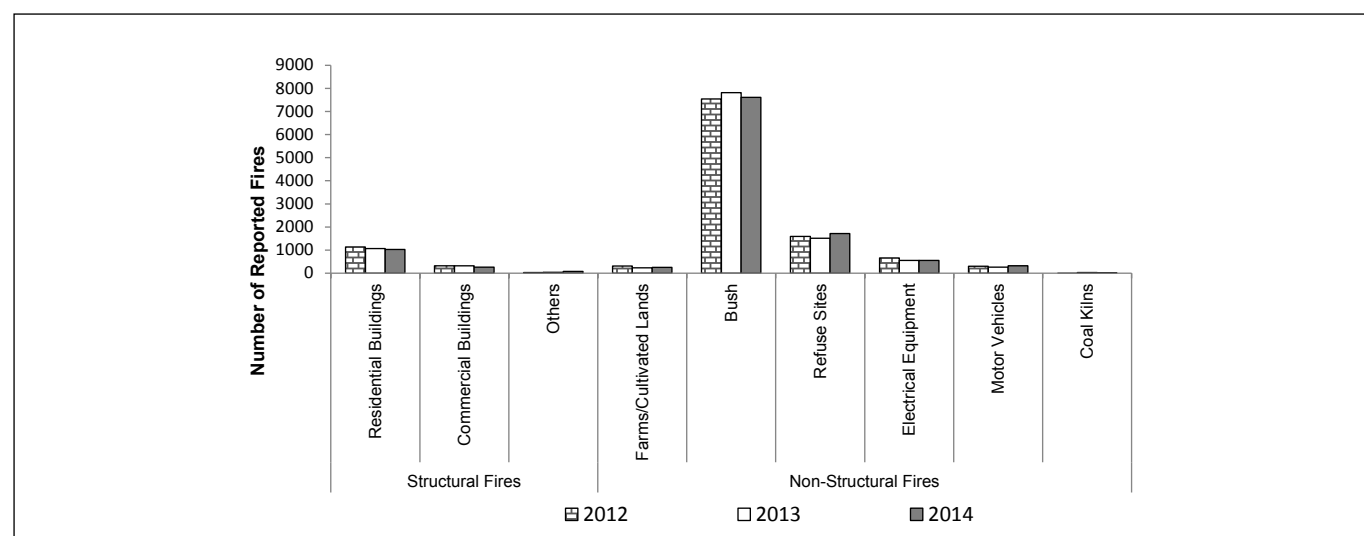


FIGURE 3E: FIRES BY CLASSIFICATION, 2012–2014

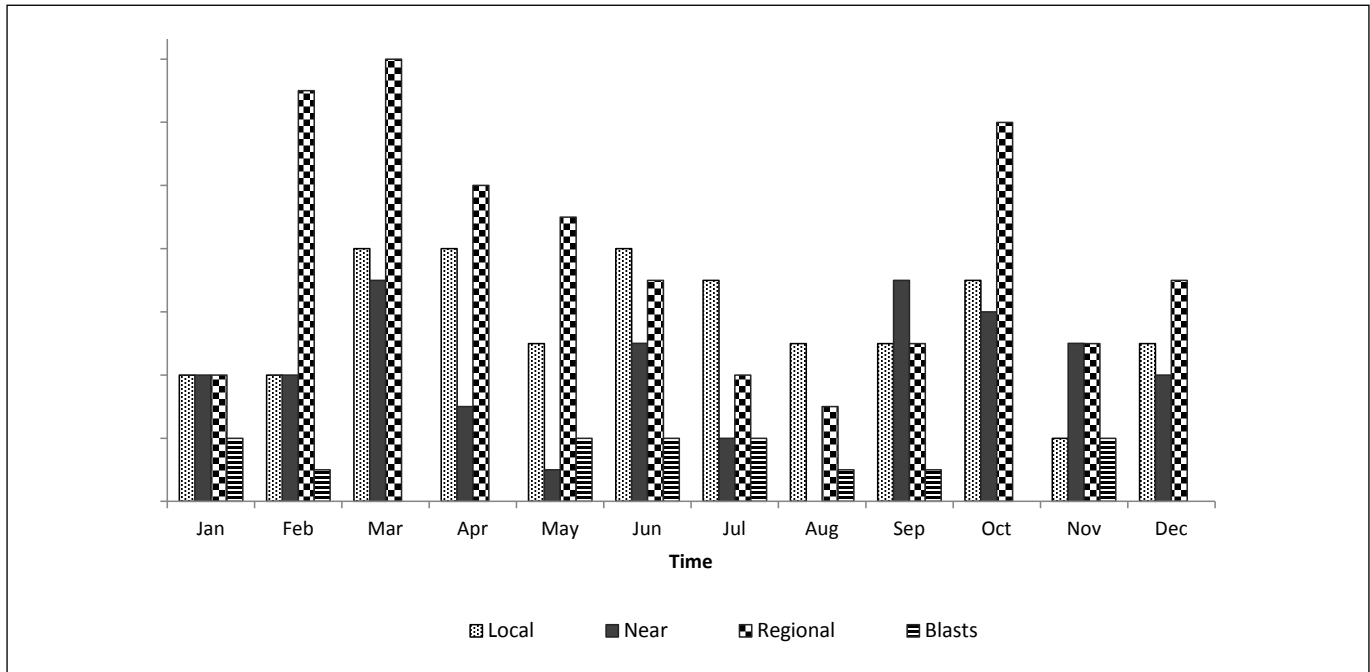


FIGURE 3F: EARTHQUAKES IN JAMAICA, 2014

- training of about 300 volunteers from 10 communities across the parishes of St Catherine, Portland, St Thomas and St Mary in disaster mitigation. Training took place under the theme “Community volunteerism – key to mainstreaming vulnerable populations in disaster risk reduction and resilience”. The areas covered included initial damage assessment; first aid; management of shelters; live search and rescue; and the care of the elderly and persons with disabilities.
- launch of the Schools’ Emergency Preparedness and Response Planning Competition which encourages schools to implement their own Emergency Preparedness and Response Plans (EPRP). ODPEM partnered with the United Nations Children Fund (UNICEF).
- A Seismic Risk Forum to urge participating countries from Latin American and Caribbean to increase preparedness and awareness of earthquakes. The forum was hosted in collaboration with UNDP.

SPATIAL DATA MANAGEMENT

GIS Growth Evaluation

An assessment of the growth of geospatial technologies was carried out using the annual GIS Growth Evaluation Survey. A total of 50 public and private sector agencies were polled and 21 responded—18 public and 3 private sector agencies. Survey results show that 76.0 per cent of the respondents effectively integrated GIS into mainstream operations or business processes. This included operational activities and decision making related to parcel data

maintenance, forest management, subdivision and building approval process, landscape development and 3D rendering, climate change scenario modelling, crime scene investigation, epidemiology, hydrology, and community mapping. There were 95 persons trained and educated in GIS in the entities sampled with 57.0 per cent of those trained at the certificate level. This could possibly be a reflection of the availability of GIS certificate level training provided by the government and private sector. Approximately 71.0 per cent of respondents reported earnings from new and existing geospatial products and services with 24.0 per cent reporting earnings of over \$1.0 million. Some 70.0 per cent indicated being involved in the practice of metadata management and 21.0 per cent shared data accompanied by metadata. In addition, 57.0 per cent of respondents had documented policies on data sharing, ownership, maintenance and liabilities all of which indicated that clients were required to sign a Memorandum of Understanding (MOU) or disclaimer to obtain data. Three agencies reported losing a total of four GIS personnel to migration. The status of selected GIS indicators is shown in Table 3.16

Geospatial Data Creation

Falmouth Street Centerline – The street centreline data for Falmouth, Trelawny, were updated with the assistance of handheld global positioning system (GPS) devices. The update was the first done for that area since the creation of the database in 2004. The road segments and street names for that portion of the database (i.e. Falmouth and environs) were updated to reflect the status of streets as at 2014. The dataset, which was developed by the National Land Agency,

TABLE 3.16
SELECTED GIS GROWTH AND DEVELOPMENT INDICATORS, 2014

	2013	2014
Sample Size		
Number of respondents to questionnaire	23	21
Capacity		
Number of organisations that use GIS Services	23	20
Number of organisations that use and provide GIS Services	10	15
Number of organisations that have integrated GIS into its mainstream operations or business processes	14	16
Average number of GIS positions in organisations	4	4
Average number of persons who perform GIS tasks but not employed to a GIS position	7	5
Number of persons trained and educated in GIS in entities sampled	33	54
	7	2
	25	19
	22	20
GIS personnel lost to migration	2	4
Functional Data Servers	31	15
Functional Plotters	25	20
Functional Large Format Scanners	18	21
Finance		
Average Gross Annual Salary paid to GIS Personnel (\$ million)	1.7	1.7
Number of respondents earning over \$1.0 million from new and existing geospatial products and services	1	3
Standards		
Number of organisations with documented policies on data sharing, ownership, maintenance and liabilities	10	12
Average number of staff dedicated to metadata management	1	1
Number of organisations involved in metadata management	14	15
Accessibility of Geospatial Data		
Average number of GIS software licences	5	5
Number of Internet map services	11	10
Number of organizations that sell spatial data	7	8
Awareness		
Average number of workshops, conferences, training courses etc. attended by staff	Local Conferences/Seminars, 1 Local training (2–5 days), 1	Local Conferences/Seminars, 2 Local training (2–5 days), 2 International Conferences/Seminars, 2 International training (2–5 days), 0
Number of persons involved in GIS professional associations	36	24

Source: Data compiled from survey conducted by PIOJ

will be useful for producing digital and hardcopy general street reference maps, address matching (geocoding), transportation and facility planning, and vehicle routing.

Census Map Books and Community Boundaries –

The process of preparing map books showing census data was improved through the use of specialised GIS software. The Census map books, prepared by the Statistical Institute of Jamaica, display the census boundaries along with related demographic data such as population and dwellings, in tabular format. Map books were prepared for the parishes

of Hanover, St. Catherine, St. Thomas, St. Mary, Kingston, St. Andrew, St. Ann, and Trelawny. These books will help to diversify the ways in which census-related data are represented and made available to the public. Community boundaries for the entire island were also created with the use of GIS. The initiative led by STATIN in collaboration with the Social Development Commission is to standardize community boundaries defined and used by both agencies. The agreed community boundaries will facilitate the representation of demographic data and those of other surveys consistent with the census

enumeration districts. The community boundaries will be the basis for the update of the poverty map and allow for improved targeting of social policy initiatives.

Plantation Mapping and Forest Boundary Verification – IS and related technology was utilized to identify suitable lands for planting under the JaREEACH project. The location of 200.0 ha of land was identified and surveyed using satellite imagery and GPS receivers. The data captured were used to facilitate the verification process and update the plantation inventory. In addition, the technology was instrumental in enhancing the accuracy of the Forestry Department’s data and monitoring activities in a series of forest boundary verification. The boundaries of five forest reserves (Kellits Camperdown, Spring Dunrobin, Newton, Spring Hillside, Fellowship) were verified using survey diagrams cross-checked with the location of boundary markers/ monuments in the field.

Drought Impact Mapping – To assess the impact of the recent drought on the island and the mapping of the locations of drought affected areas and bush fire incidents islandwide, GIS and related technology was used. Communities most impacted by bush fires in the parishes of St. Catherine, Kingston, St. Andrew, Clarendon and St. Ann were also mapped (Appendix 3A). NERGIST volunteers supported impact assessment with an analysis of the possible areas affected by the fire in Jack’s Hill, St Andrew (within a 10 kilometre (km) radius). The group prepared a series of GIS web applications and digital maps highlighting communities most affected by bush fires between January and September 2014 as well as the location and status of hydrants. These maps assisted the ODPEM and the Jamaica Fire Brigade to assess the impact of these incidents and support planning for future events.

Geospatial Analysis – The use of advanced geospatial analysis provided key information to facilitate data-driven decision making in the areas of sanitation management, land use/cover change analysis and disaster risk management. Analyses were conducted for the following:

Ministry of Education School Sanitation Project – IS analysis supported the Ministry of Education’s School Sanitation Project which aims to determine/assess the possible risk of contamination to water resources from existing pit latrines. The WRA used the technology to identify the location of schools in relation to aquifers and surface water resources. The relationship between the schools’ location, type of rock formation/geology and hydrostratigraphy were used to assess the risk of contamination. The findings will inform system

upgrades and the change-over to flush systems, where necessary.

Storm Surge and Sea Level Rise Hazard Assessment – Digital spatial data depicting storm surge hazard footprints for 10, 25, 50 and 100 year storm surge scenarios were generated to support the preparation of storm surge modelling and sea level rise scenarios for the Negril Climate Risk Atlas. The activity was undertaken as a part of Component 3 of the GOJ/ Adaptation Fund Programme – *“Enhancing the Resilience of the Agriculture Sector and Coastal Areas to Protect Livelihoods and Improve Food Security Programme”*.

Land use/ cover change analysis – the national land-use/land-cover classification and change assessment was conducted by the Forestry Department with the use of satellite imagery and associated remote sensing technology and analysis. Under the GOJ/EU/UNEP CCADRRP, the Forestry Department conducted comparative land cover image analysis between 1998 and 2013 to determine the extent of forest change and assess the rate of deforestation or afforestation across the island. The exercise was conducted using multispectral satellite images with resolution of 0.5m which allowed for a detailed supervised classification to be conducted. The classification exercise coupled with field verification (ground truthing) allowed for the determination of the land use as well as enabled a change detection analysis. The technology facilitated the assessment of land use/ covers interaction, to determine trends and patterns of association, as well as draw inferences on the causes for the conversion of lands between classes.

Geospatial Web Applications

The availability, accessibility and sharing of Jamaica’s geospatial data was enhanced by the development and maintenance of mobile and web-enabled GIS applications. Among these were the:

- **Disaster Risk Information Platform (DRIP)** developed for the parish of St. Catherine, is a compilation of risk information that serves to inform decision making by the Parish Council. The DRIP serves as a tool to identify, analyze and disseminate lessons learnt, best practices, technologies and methodologies for disaster risk reduction. The National Spatial data Management Division (NSDMD) developed the platform to create an information hub where users are able to access studies, maps, and research related to hazard, risk and vulnerability information specific to St. Catherine. The

DRIP also has a geospatial interface where web-maps can be published and geospatial data downloaded.

- **Geospatial Damage Assessment Tool (GeoDAT)**, a post-impact assessment tool/application (app) developed specifically for the NERGIST. The mobile application allows for rapid assessment to evaluate the impact of a disaster event. GeoDAT, developed by the NSDMD, seeks to improve the efficiency with which post-impact data are collected and facilitate the speedier preparation of damage assessment reports. Data can be collected on a variety of mobile devices such as tablets or smartphones and then uploaded to a web-based service for real-time viewing and analysis by disaster management officials. The app integrates to device cameras and GPS technology allowing assessors to photograph and precisely map damage locations. Aggregate data from assessor reports can be viewed in a dashboard format and downloaded to support requests for disaster aid from other agencies involved in the disaster response process.
- A **Chikungunya Web Application** was developed through a collaborative effort of the ODPEM and the NSDMD to assess the spread and impact of the Chikungunya virus (Chik V) which affected the island. The application was used to identify possible breeding sites by mapping 129 reported cases of

Chik V for the months of September to October along with information on incident description and fatalities.

Database Development and Management

Databases to support land administration and forestry data management were developed and maintained during the period. These included:

- Manchester Building Permit and Tax Administration Audit – GIS Mobile technology was used to strengthen the monitoring and enforcement processes of the Manchester Parish Council in the execution of tax administration and building permits audits. The audit utilised the technology to build a database to identify all delinquent property owners and record when the summons are served. In the database, all building plans that were approved and assigned a permit were given a spatial reference. With a detailed database of the approval status of the house, the enforcement team of the Council can accurately identify buildings that are illegally developed and sanction these developers according to the relevant laws. The Council can also estimate how much money is lost to illegal development.
- Enterprise GIS Implementation – a multiuser database was customized and forestry web, mobile and android data collection applications were developed

TABLE 3.17
LICJ GIS TRAINING AND EDUCATION CONDUCTED BY THE NSDMD, 2014

Activity	Courses	Date	Level of Participation	Total Number of Participants	
				F	M
LICJ GIS Training (8 sessions)	Applied GIS	May 12–16 & 19–21, 2014	University lecturers	6	2
	GNSS Data Collection & Editing	August 13–15 & 18, 2014	University lecturers	3	3
	Metadata Creation & Management	14-Oct-14	Managers, Technicians & GIS Professionals	9	7
	GNSS Data Collection using ArcPad	23-Oct-14	Survey Technicians	7	3
	GNSS Data Collection: Terrasync & GPS Pathfinder	October 29–31, 2014	Fieldworkers (All Island Jamaica Cane Farmers)	1	7
	GNSS Data Collection: Terrasync & GPS Pathfinder	04-Dec-14	Fieldworkers (All Island Jamaica Cane Farmers)	1	4
	Introduction to GIS (using ArcGIS 10.2)	December 8–12, 2014	Managers and Technicians	7	5
	Applied GIS (using ArcGIS 10.2)	December 15–19, 2014	Managers and Technicians	3	4
			Total	37	35

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

to facilitate efficient storage of forestry related data and improved access through an enterprise level GIS server and mobile GIS system. The system, which allows access to GIS officers and other internal clients of the FD, is built on the work started under the CCADRRP.

Capacity Building and Awareness

Training

Metadata Management—one metadata training workshops and five consultations for users and creators of geospatial data were held. Persons from 11 government organizations were trained in metadata creation and management and the utilization of the Land Information Council of Jamaica (LICJ) metadata portal.

Seventy-two persons (37 females) benefited from eight training sessions delivered by the NSDMD and the LICJ. Participants included university lecturers, managers, GIS professionals as well as fieldworkers from the All Island Jamaica Cane Farmers Association who were trained in the use of Global Navigation Satellite Systems (Table 3.17). The uptake for training doubled compared with 2013. In the Health sector, 138 Behaviour Change Communication (BCC) officers were trained by the Ministry of Health in the use of GIS and GPS technology while one private sector entity delivered GIS training to representatives from the Early Childhood Commission.

In addition NERGIST was officially launched and 30 GIS volunteers from GOJ MDAs and private sector organizations became NERGIST certified professionals through a collaborative effort among the ODPEM, NSDMD and the LICJ.

Awareness

GIS sensitization and awareness raising initiatives included the staging of GIS symposia, technical seminars and the annual Geography Awareness Week, and GIS Day activities. The NSDMD staged two LICJ GIS symposia focusing on GIS in climate change and disaster management and the use of UAVs and remote sensing. The annual **Geography Awareness Week and GIS Day** celebrations were hosted under the theme ‘GIS...Only a Click Away’. The week’s activities included the:

- Sharing of research work of UWI and UTECH students with 40 persons from over 18 organizations through the hosting of a series of GIS Technical Seminars
- the 7th Annual GIS Business Executive Forum under the theme ‘Enhancing the Local Real Estate industry

through GIS’ - attended by 72 delegates from 42 organizations

- the 12th GIS Day Exposition at UWI, Mona, which catered to 462 students and 23 teachers from 17 secondary schools and 4 tertiary level institutions
- the LICJ Booth Exhibit and GIS Sensitization Sessions for 183 students at the Convent of Mercy Academy Alpha IT Exposition.

OUTLOOK

Efforts to improve the country’s resilience to climate change and promote disaster risk reduction and environmental resource management should be strengthened with the continued implementation of existing projects and approval and commencement of new ones. In addition, the regulatory and institutional framework to promote sustainable development should be enhanced with the:

- adoption of the Climate Change Policy Framework as a White Paper by both Houses of Parliament
- finalization of Natural Resources (Managed Resource Protected Area) Regulations by the Chief Parliamentary Council
- tabling in Parliament of the Land Divestment Policy
- approval by Cabinet and tabling in Parliament of the Forest Policy as a Green Paper

Completion of the rainwater harvesting policy and ongoing implementation of water management systems under various climate change adaptation projects, and irrigation schemes, as well as judicious management of ground water resources should assist in mitigating the adverse effects of projected decline in rainfall³². These along with exposure of farmers to adaptive agriculture techniques should help to increase the resilience of the agriculture sector.

The effectiveness and efficiency of the Development Applications Process should be further enhanced with the full operationalization of the AMANDA System in all Commenting Agencies by June 2015. This is expected to complement the earlier roll-out of the system in the Local Authorities thereby expediting the processing and tracking of development applications. Security of tenure and the potential to exploit the value of property should increase with the planned issue of 1 000 land titles under LAMP I, and 1 500 under the extension contract of LAMP II. The programme is targeted for expansion to the parishes of St. Ann, Westmoreland, St. James, Trelawny and Hanover. Reform to improve security of tenure should also advance under the Jamaica Land Titling Programme through which the Government is moving to transfer titles held by a number

of its agencies to landowners. A total of 15 000 land titles per year over the next three years are targeted and are to be facilitated by legislative amendments, among other things.

Financing for protected areas management should become more certain and dependable with the launch and operationalization of the National Conservation Trust Fund Jamaica. The Fund is expected to develop and approve instruments to facilitate the sustainable financing the system of protected areas. This along with the raft of environmental awareness and behavior modification campaigns, as well as improvement in monitoring by the main environmental agency should positively influence environmental stewardship.

A number of negotiations and activities in the international development arena are expected to be undertaken in 2015 and to have far reaching implications and effects for Jamaica. These include a new protocol, another legal instrument or an agreed outcome with legal force under the UNFCCC, and agreement on the Sustainable Development Goals, the successor to Millennium Development Goals. The former should stipulate ambitious emissions reductions targets and more support for climate change adaptation for developing countries. The latter is likely to dictate the local and international development agenda, particularly with respect to social development, for at least a decade. ■

SCIENCE, TECHNOLOGY AND INNOVATION

INTRODUCTION

As a means of advancing the STI-driven growth agenda outlined in Vision 2030 Jamaica – National Development Plan, emphasis was placed on STI policy development and institutional strengthening. This was supported by activities aimed at improving Science, Technology, Engineering and Mathematics (STEM) education; broadening access to and use of Information, Communication and Technology (ICT) to enhance business efficiencies; developing renewable energy potential; promoting more competitive industry structures; and increasing funding for STI programmes. Realization of sectoral priorities was facilitated largely by public funds earmarked for STI programmes. This allocation increased by 64.4 per cent to \$5 509.4 million.

Ongoing developments in area of STEM education included the transformation of the Sydney Pagon High School to a STEM Academy and the continued roll-out of the E-Learning Jamaica and Tablets in Schools (TIS) projects. The latter utilized ICTs to improve numeracy and literacy skills. The shift in the STEM education paradigm was also evidenced in tertiary institutions expanding the use of ICTs to deliver content and enhance efficiencies.

In keeping with its mandate, e-Gov Jamaica Limited (formerly Fiscal Services)¹, facilitated 12 additional e-government services coming online in 2014. Expanded offerings included applications such as the Jamaica Customs Agency (JCA) ASYCUDA World, an automated customs management system being piloted for commercial exports at Port Bustamante, and the Road Operations Management System (ROMS), which allows the Transport Authority to manage operations such as schedules, document verification and manage compliance actions.

With respect to the institutional framework for STI, the National Commission on Science and Technology (NCST) was reconstituted in October as the main coordinating

mechanism to bridge the Government-Industry-Academia divide with a view to making national STI efforts more impactful and sustainable. To this end, the NCST was tasked with two priority actions, namely, the preparation of a national STI Policy and the development of a conceptual framework for the expansion and sustainability of a National Nutraceuticals Industry (NNI).

GLOBAL TRENDS IN STI

Globally, investments in Research and Development (R&D) in areas such as energy technologies, high-performance computing and software development, robotics, and biotechnology,² are expected to advance industry-driven economic growth. While the level of investment in R&D is not the only determinant of socio-economic development, it is a critical factor amongst others such as infrastructure development, STEM education levels, property rights (including intellectual property), and quality of health care.

The indicative value of global Gross Expenditure on Research and Development (GERD) was approximately US\$1.6 trillion, an increase of 6.3 per cent relative to 2013.³ The United States of America (USA), China, Japan, and Europe accounted for almost 80.0 per cent of the total global investment, with a combined spend of approximately US\$1.3 trillion. With a country strategy focused on supporting work in basic research, reinforced by appropriate tax and policy incentives, the USA retained its world leading position with total investments valuing US\$464.5 billion. This was 3.3 per cent above 2013 and accounted for 2.8 per cent of GDP. Second-placed China increased its level of research investment to 2.0 per cent of GDP, recording a US\$284.0 billion spend. This represented a 10.1 per cent increase over the previous year's expenditure. China's country strategy placed emphasis on development projects such as large scale deployment of clean energy and advanced grid technologies, establishment of state of the art nuclear power plants, and high speed rail systems.

1. Provision of ICT services to ministries and departments
2. Including nanobiotechnology
3. 2014 Global R&D Forecast, Battelle/R&D Magazine

The Rest of the World (ROW)⁴ accounted for the remaining \$350.0 billion spent. This category represented a non-homogenous group of countries with varying levels of priority placed on R&D and innovation-driven growth. The geographical share of R&D spending continued to shift. Asia's share (39.1 per cent) increased (led by China, Japan and Korea), whereas the USA's (31.1 per cent) and Europe's share (21.7 per cent) both declined.

R&D can be regarded as long-term investment which can yield scientific breakthroughs and innovation that can significantly impact day-to-day life. Some notable scientific breakthroughs in 2014 included:

- **Photoswitches Advancing Solar Technology:** scientists at the Massachusetts Institute of Technology and Harvard University developed materials called photoswitches which can harness and store solar energy at the molecular level. This energy can then be released for heating, lighting and cooking by exposing the molecules to a small amount of light, heat, or electricity. The technology could provide another solution for energy storage, which challenges efforts to scale up the use of solar technologies
- **Sensory-Enhanced Artificial Limb:** testing of a prototype sensory-enhanced prosthetic limb yielded positive results. In a clinical trial the first case of an amputee regaining his sense of touch (sensory feedback) through the use of a prosthetic arm was recorded. The prosthetic arm was fitted with electrodes which were surgically implanted into the patient's remaining nerves. The research augurs well for the rehabilitation of amputees.
- **Natural Bacteria Combating World Hunger:** three teenaged scientists in Ireland experimented with the relationship between diazotrophic rhizobia⁵ and staple crops (such as barley and oats) to improve their productivity. The results included decreased germination times of up to 50.0 per cent and increased dry mass yields by up to 74.0 per cent. This research should have positive implications for food security.

Selected international and national inventions for 2014 are highlighted in Box 4.1.

STI AT THE NATIONAL LEVEL

Policy and Regulatory Framework

The National Commission on Science and Technology (NCST), an agency of the Ministry of Science, Technology, Energy and Mining (MSTEM), was reconstituted in October with a mandate to improve the quality of life of all Jamaicans

4. Include countries such as Brazil, India, South Korea, as well as countries in Africa, the Middle East, the Confederation of Independent States (Azerbaijan, Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Uzbekistan and Ukraine)
5. Bacteria found in the soils which 'fix' or convert atmospheric nitrogen to the biologically useful ammonia, for uptake by plants.

BOX 4.1 SELECTED INVENTIONS IN 2014

International ^a

Hemopurifier: a single-use broad spectrum bio-filtration device designed to remove viruses and shed glycoproteins from the blood of infected individuals. Outfitted with a lectin filter, the cartridge is attached to a dialysis machine which removes the virus from the blood before it goes back into the body. Results of human trials showed that the device significantly reduced the viral load in a patient listed as critically ill with the Ebola virus, without adverse effects to the patient. The technology could find use in the wide-scale treatment of Ebola and other similar viruses.

National ^b

H2Flex system: a water-hydrogen hybrid kit which uses water (of any quality including wastewater), aluminium and caustic soda (sodium hydroxide) to generate hydrogen gas, which can then be used as a fuel source. This can be used in place of, or alongside traditional fossil fuels to power and improve the performance of automobiles. Computer technology (the main feature of the innovation) is used to control the process. The invention was the overall winner in the National Innovation Awards, 2014.

Pump N Spray water dispenser: a foot-operated pumping system, which delivers a continuous 'spray' of water when activated. It has been adapted for use with 1.0 or 5.0 gallon plastic bottles. The low-technology design, plastic parts and small size, make the device convenient, easy to use and portable. It can therefore be used in water-scarce areas or as a portable washing facility. It also presents an innovative use for recycled plastic water bottles. The invention was a winner in the National Innovation Awards, 2014.

a - Time Magazine, November 2014

b - National Commission on Science and Technology, March 2015

through the application of Science and Technology (S&T) for social and economic development. This is expected to be achieved through the implementation of strategies aimed at:

- improving the utilization of S&T for competitive and profitable businesses
- making S&T efforts for national development more efficient, impactful and environmentally sustainable
- developing local S&T competence and capability
- strengthening the National Innovation System
- promoting and popularizing STI to engender a better understanding of its importance
- broadly disseminating knowledge and information on STI.

Priority activities undertaken by the NCST were (i) the provision of technical support to the MSTEM to commence

the preparation of a comprehensive national STI Policy and (ii) planning for the elaboration of an appropriate framework for the development and regulation of a National Nutraceuticals Industry (NNI),⁶ to embrace the cultural science and technology surrounding Jamaica's healing plants, minerals and waters. The latter was guided by a NNI Steering Committee with a mandate to, amongst other things, develop appropriate terms of reference and propose legislative and institutional arrangements for the industry, whilst promoting Brand Jamaica.

Other policy and legislative matters related to STI included⁷ :

- Submission of Drafting Instructions to the Chief Parliamentary Council for a revised Electricity Act. The updated legislation is expected to promote energy efficiency initiatives in the public and private sectors and encourage the expansion of RE resources
- The Electricity Appeal Tribunal setting aside the previous Determination made by the Office of Utilities Regulation (OUR) in respect of the framework for the wheeling⁸ of electricity. The provision for wheeling of electricity by self-generators across the national grid is expected to promote competition in the electricity sector, through, for example, increased opportunities for RE generators. The matter was resubmitted to the OUR for reconsideration.

STI Financing

At \$5 509.4 million, the STI allocation in the 2014/2015 budget increased by 64.4 per cent. This was approximately 1.0 per cent of the national budget. Allocations rose across all budget categories, but the main contributors to this increase were the \$1 002.7 million allocation in the recurrent budget for e-Gov Jamaica Limited and the capital budget for the E-Learning Jamaica Project. The latter received \$1 237.0 million to stimulate improvement in education through the use of ICTs (Table 4.1).

The Scientific Research Council (SRC) was apportioned 84.0 per cent (\$369.8 million) of the MSTEM R&D recurrent budget to support the development of indigenous capacity and stimulate technological advancement within priority sectors.

The R&D budget also covered provisions for the operations of the NCST and the International Centre for Environmental and Nuclear Sciences (ICENS). In support of the government's efforts to boost national food safety systems, the recurrent budget for Veterinary Laboratory Services increased by 60.0 per cent to \$114.2 million. This was allocated to improve diagnostic capabilities for the investigation of animal, zoonotic⁹ and food-borne diseases.

Energy projects commanded 36.8 per cent of the STI capital budget (A and B), with \$757.2 million earmarked to finance projects aimed at improving energy security, promoting energy conservation and efficiency in the public and private sector, and developing RE potential. The remainder of the STI capital budget was designated for R&D, ICT projects and improving the national innovation ecosystem.¹⁰ The STI Ministries, Agencies and Departments continued to supplement budgetary allocations through revenue generating activities and grants from external funding sources.

STI CAPACITY BUILDING FOR DEVELOPMENT

Standards Development

The development and/or adoption of mandatory national standards for products, processes, facilities and services is essential to foster sustainable prosperity as articulated in Vision 2030 Jamaica. The implementation of internationally recognized certification and accreditation systems such as ISO¹¹ 9001 (Quality Management) and ISO 14000 (Environmental Management) also serve to boost competitiveness of local businesses, through enhanced consumer confidence, improved efficiencies, improved access to international markets, and mitigating the need for retesting in importing countries¹².

In 2014, the Bureau of Standards Jamaica (BSJ) facilitated the development, adoption and publication of standards for sectors such as agriculture, food production, construction and manufacturing. A total of 19 national standards were published, with an additional nine developed and awaiting gazetting. Twenty-nine ISO international standards were approved for adoption as Jamaica standards.

The Jamaica National Agency for Accreditation (JANAAC) reported that one additional conformity assessment

6. Nutraceuticals are medicinal or nutritional components of plants, food, or naturally occurring material which may have been purified or concentrated and used for the improvement of health by treating or preventing disease
7. See chapter on Energy, Electricity and Water
8. Transmission of electricity from a generator to a satellite location via the national grid
9. Infectious diseases of animals which can be transmitted to humans
10. Mainly the updating of Intellectual Property (IP) systems and public education on IP rights
11. International Standards Organization
12. 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.

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

PROGRAMME	REVISED ESTIMATES 2013/2014	ESTIMATES 2014/2015	PERCENTAGE CHANGE 2014/15 2013/14
Ministry of Agriculture & Fisheries			
Research & Development	349 753	374 863	7.2
Veterinary Services: Labarotary Services	71 399	114 228	60.0
Information Communication Technologies	32 938	30 189	-8.3
Ministry of Science, Technology, Energy and Mining			
Research & Development	450 158	440 519	-2.1
Technical & Economic Department (Energy Division)	28 291	30 750	8.7
Technology Administration	118 276	124 844	5.6
Policy Formulation, Implementation and Monitoring	15 833	17 811	12.5
Central Information Technology Office	19 444	0	-100.0
Geological, Geo-technical and Regulatory Services ^a	134 961	151 471	12.2
Fiscal services	0	1 002 703	100
E-learning Project	90 260	82 148	-9.0
Ministry of Industry, Investment & Commerce			
Food Storage and Prevention of Infestation	130 740	130 038	-0.5
Industrial Development, Foreign Investment and Export Promotion	812 335	883 171	8.7
Protection of Intellectual Property Rights	68 741	70 576	2.7
Research & Development	0	0	0
SUBTOTAL RECURRENT	2 323 129	3 453 311	48.6
CAPITAL A			
Ministry of Agriculture & Fisheries			
Research & Development	29 800	0	-100.0
Ministry of Science, Technology, Energy and Mining			
Energy Policy	0	0	0
Geological, Geo-technical and Regulatory Services	16 014	0	-100.0
E-learning Project	332 599	1 237 000	271.9
Ministry of Industry, Investment & Commerce			
Industrial Development, Foreign Investment and Export Promotion	86 921	0	-100
SUBTOTAL CAPITAL A	465 334	1 237 000	165.8
CAPITAL B			
Ministry of Agriculture & Fisheries			
Research & Development	0	0	0
Ministry of Science, Technology, Energy and Mining			
Energy Conservation and Management	513 268	757 163	47.5
Establishment of GovNet ^b	1 079	15 000	1290.2
Enhancing the ICT Regulatory Environment	0	15 000	100.0
Research & Development	0	28 135	100.0
Ministry of Industry, Investment & Commerce			
Industrial Development, Foreign Investment and Export Promotion	49 350	3 800	-92.3
SUBTOTAL CAPITAL B	563 697	819 098	45.3
GRAND TOTAL	3 352 160	5 509 409	64.4

a - Includes metallic minerals and non-metallic minerals exploration; geological and geotechnical assessments

b - Government network infrastructure

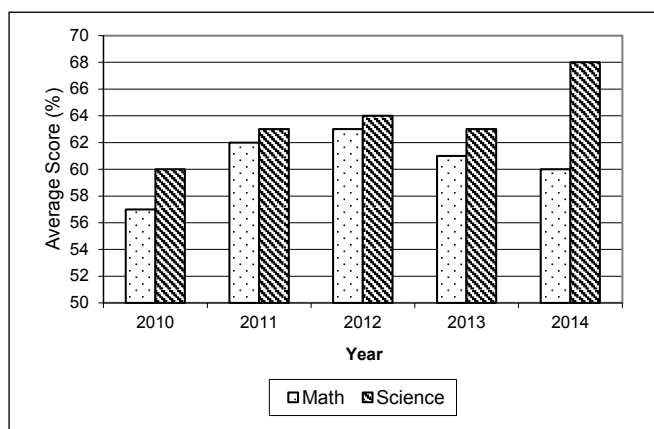


FIGURE 4A. PERFORMANCE OF JAMAICAN STUDENTS IN MATHEMATICS AND SCIENCE IN THE GSAT EXAMINATIONS, 2010-2014

body¹³ was accredited during the period, bringing the total to nine¹⁴. Accreditation services provided by JANAAC were complemented by technical workshops, seminars and training sessions.

According to data collected by the National Certification Body of Jamaica (NCBJ), at least two other companies received ISO 9001 certification since 2013, bringing the total to 36.¹⁵ However the number of companies certified to ISO 14001 declined by one to 10. The NCBJ surrendered its accreditation status to certify companies to the ISO 14001 standard due to a declining demand by local clients.

STI Education

Advancements in the STI sector require, among other things, a strong focus on science education and training at all levels of the education system, to create the required knowledge base and capacities to integrate science and technology into all areas of development. The performance indicator used for Science and Mathematics at the primary level is the average scores obtained in the Grade Six Achievement Test (GSAT). For the 2014 cohort, the average score for Mathematics was 60.0 per cent

The average score for Science was 69.0 per cent, 5.0 percentage points higher than the previous year. Female students continued to out-perform their male counterparts in both Mathematics and Science (Figure 4B).

At the secondary level, the main indicator of performance is student achievement in Mathematics and core Science subjects¹⁶ at the May–June sitting of the Caribbean Secondary Education Certificate (CSEC) examinations. In 2014, there were approximately 1 747 fewer students sitting these subjects, a decline of 2.2 per cent relative to 2013. This was primarily due to a 5.1 per cent decrease in the number of students sitting Mathematics (Table 4.2).

There were improved performances in all subjects assessed, as evidenced by the higher proportion of students attaining passes at Grades 1–3¹⁷ relative to 2013 (see Figure 4C). The percentage point increase in Mathematics, Physics and Chemistry was 14.8, 10.9 and 7.0 respectively. Consistent

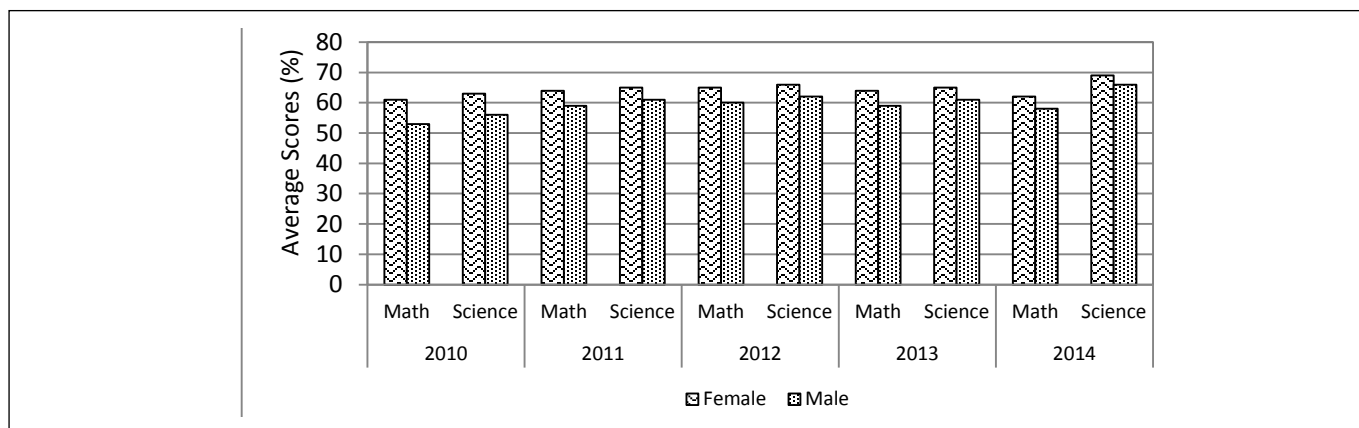


FIGURE 4B: PERFORMANCE OF JAMAICAN STUDENTS IN MATHEMATICS AND SCIENCE IN THE GSAT EXAMINATIONS BY SEX, 2009–2013

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

14. This includes the National Certification Body of Jamaica (NCBJ), seven testing and one medical laboratory.

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

16. Information Technology is included here due to the high priority placed on ICT development

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

TABLE 4.2
JAMAICAN CANDIDATES^a SITTING SELECTED S&T SUBJECTS IN
THE CSEC MAY-JUNE EXAMINATIONS (GENERAL AND TECHNICAL PROFICIENCY LEVELS), 2010–2014

SUBJECTS	2010	2011	2012	2013	2014	Percentage change 2014/13
Biology	5 815	6 266	6 760	6 758	7 066	4.6
Chemistry	5 978	6 642	6 906	7 048	7 055	0.1
Information Technology	12 291	13 789	14 321	14 083	14 120	0.3
Mathematics	41 252	42 411	46 805	45 530	43 205	-5.1
Physics	5 596	5 692	5 991	6 054	6 280	3.7

a - Candidates include resits

Source: Caribbean Examinations Council (CXC) Office, Jamaica

with recent trends, the percentage of students attaining Grades 1–3 in Mathematics (48.9 per cent) lagged behind all other subjects.

In keeping with the trend over the last five years, the percentage of students attaining Grades 1–3 in the Sciences was outpaced by that of Technical and Vocational, Business and the Arts (Figure 4D). Notwithstanding, there was an overall 8.7 percentage point increase in the number of students attaining passes in science subjects at Grades 1–3 compared with 2013.

Science, Technology, Engineering, and Mathematics (STEM)

High on the national development agenda is strengthening STEM education, particularly at the secondary level. This strategy is expected to yield a workforce which is more responsive to emerging market needs and trends, enhanced youth employment and employability, and greater levels of entrepreneurship and innovation. In December, the PIOJ in collaboration with the Ministry of Labour and Social Security, hosted the 5th Labour Market Forum to underline the burgeoning demand for STI-related skills and occupations.

The forum was held under the theme, “Promoting Youth Employability and Entrepreneurship through Science, Technology, Engineering, and Mathematics” (see chapter on Labour Market).

In line with the national thrust towards the establishment of STEM academies (see chapter on Education). The Sydney Pagon Agricultural High School in St Elizabeth began its changeover to a STEM-oriented curriculum. The shift resulted in the upgrading of laboratory, classroom, library facilities, as well as training and sensitization of teachers, parents, students and the wider community.

Other efforts aimed at improving STEM education were supported by initiatives such as the SRC-managed Innovation Capacities in the Caribbean (INVOCAB) project, which aims to support capacity assessments in selected schools; train teachers; equip science laboratories; and host innovation competitions, among other things. Project results will be used to inform STI Educational Policy. The Ministry of Education also set aside funds for the upgrading of teaching capacity in science as well as technical and vocational subjects through summer programmes, workshops and seminars.

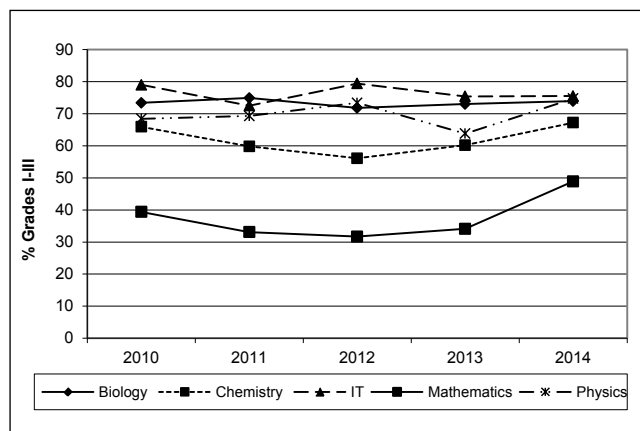


FIGURE 4C: PERFORMANCE OF JAMAICAN CANDIDATES IN SELECTED SCIENCE SUBJECTS IN THE CSEC MAY-JUNE EXAMINATIONS, 2010-2014

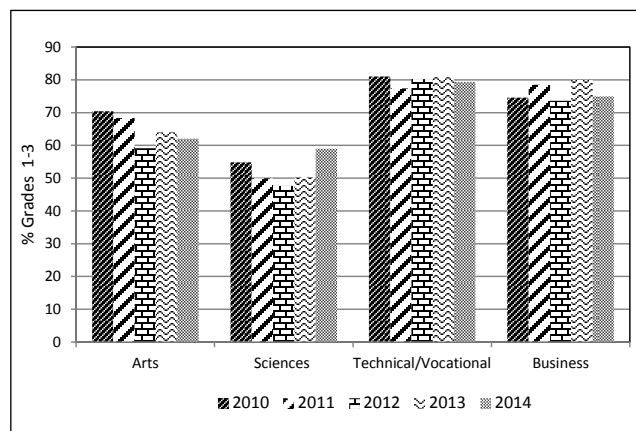


FIGURE 4D: COMPARISON OF PERFORMANCE OF JAMAICAN CANDIDATES BY SUBJECT CATEGORY IN THE CSEC EXAMINATIONS, 2010-2014

Tertiary

More Jamaican students were enrolled in STI undergraduate programmes in the country's two major public universities. The UWI cohort grew by 5.5 per cent to 5 019.¹⁸ UTech recorded increases in the number of nationals enrolled in the Faculty of Science and Sports (up 18.3 per cent to 732)¹⁹ and the Faculty of Engineering and Computing (up 5.0 per cent to 2 384). Northern Caribbean University (NCU), a private institution, recorded an 11.1 per cent decline to 56, in the number of students pursuing STI undergraduate degrees in the College of Natural and Applied Sciences. Undergraduate enrolment in STI programmes continued to dwarf graduate enrolment at all institutions.

The Mona School of Engineering was operationalized in the 2013/2014 academic year and launched the BSc in Computer Systems Engineering and BSc in Civil Engineering.²⁰ A total of 130 Jamaican students were enrolled in undergraduate Engineering degree programmes²¹ compared with 101 in 2012/2013. The number of nationals enrolled in higher Engineering degrees declined by 22.0 per cent to 39 (see chapter on Education). There were 813 students enrolled in undergraduate Engineering programmes at UTech compared to 803²² the previous academic year. Graduate enrolment in higher Engineering degrees remained low (11). The output of Engineers from tertiary institutions decreased by 7.9 per cent to 152 (see chapter on Education).

UTech graduated its first cohort of students for the BSc degree in Mathematics and Education; BSc in Sport Science; and BSc in Occupational Health and Safety. The institution also approved four new health related post-graduate programmes (MSc. Nursing Anaesthetist; MSc. Public Health Nutrition; MSc. Dental Therapy; and Post-Graduate Internship in Dietetics & Nutrition. NCU strengthened its Mathematics programme with the launch of the Mathematics Institute in July. The primary objective of this institute is to improve the effectiveness of teachers of Mathematics.

Tertiary institutions have had to continuously modernize their academic and research programmes to respond to evolving market needs. In an attempt to remain relevant

in an increasingly digital world, all universities utilized ICTs to improve learning outcomes and enhance efficiency. Common applications included management of student administration, library information services, and content delivery (hardware and virtual classrooms). There was greater levels of collaboration between academic institutions and the private sector—through MOUs and joint venture projects—to address the underdeveloped research-industry interface which stymies the commercialization of research output.

The UWI entered into an MOU with the Jamaica Manufacturers' Association Limited²³ to collaborate in R&D and innovation, and to foster capacity building through the sharing of scientific information; development of academic and training programmes; internships and apprenticeship; and the establishment of a Centre of Excellence. The partnership aims to support the development of appropriate policies and funding mechanisms for R&D.

UTech entered into an MOU with the National Environment and Planning Agency (NEPA) for cooperation in the areas of natural resource management and spatial planning. The university also collaborated with the Jamaica Public Service to establish a Bulk Solar Plant at the Papine Campus. Estimated to cost US\$308 000, the project sought to lower UTech's energy bill and demonstrate the viability, true costs and operational factors of solar energy projects in Jamaica, whilst serving as an educational tool for new energy technologies. Installation and commissioning of the plant took place in June 2014 and provided hands-on training for some 21 students.

STI Training and Popularization

STI popularization has been identified as a national strategic priority and is the mandate of organizations such as the NCST and the SRC. Activities undertaken in 2014 to enhance STI popularization included the hosting of conferences, seminars, workshops, expositions and University Research Days. The National Innovation Awards, Third Biennial Science and Technology Conference, and Science in the Park Expo and Career Fair (Box 2), were the marquee events for Science and Technology Month, celebrated each November.

18. This figure comprises student pursuing undergraduate Degrees in the Faculties of Science and Technology, Agriculture, and Medical Sciences

19. This figure does not disaggregate student in Science-based versus Sport-based programmes

20. Building on the BSc in Electronic Engineering previously launched in 2009. The UWI (Mona) has adopted the BSc in Civil Engineering traditionally offered by the UWI St. Augustine Campus

21. Enrollment data for the UWI Mona and St. Augustine campuses

22. Figure adjusted from that reported in ESSJ 2013 (885)

23. Based on preliminary report from the UWI Faculty of S&T

BOX 2. HIGHLIGHTS FROM THE SCIENCE AND TECHNOLOGY MONTH CELEBRATIONS – SCIENCE IN THE PARK EXPO & CAREER FAIR

- Over 40 exhibitor booths were mounted, showcasing the latest technologies being used in the health, education, security, agriculture, communication and transportation sectors. Special emphasis was placed on careers in science, technology and innovation.
- More than 60 primary and high schools participated
- Displays included the work of local inventors and innovators, who were recognized at the National Innovation Awards

STI agencies continued their efforts to build STI capacity through training in areas such as energy management, Good Agronomic Practices (GAPs), integrated pest management (IPM), post-harvest technology, and quality and risk management (Table 4.3). Capacity building of public/regulatory officers was also undertaken in areas such as sustainable solid waste management; radiation protection and safety of radiation sources; nuclear techniques in food and agriculture; soil health; food safety; ISO/IEC 17025²⁴; pest forecasting; laboratory management; agro-metrology; and scientific report writing.

Other activities undertaken during the period included laboratory tours for secondary schools; CSEC and CAPE workshops in Mathematics, Physics, and Biology; and continued sensitization of the public on opportunities in science and technology.

The BSJ also successfully hosted the annual National Quality Awards (NQA), to recognize Jamaican companies

which demonstrate excellent quality systems in production and service delivery. The Awards Ceremony was held in October 2014 in commemoration of World Standards Day.²⁵ Three major awards were handed out, in addition to five sectional awards each in the categories of Manufacturing, Service Sector, and Small and Medium-sized Enterprises (SMEs).

Research and Development

The number of R&D professionals is used as a global indicator of the level of development. Whilst there is currently no systematic collection of data on this indicator, 17 key STI institutions (public/ academic/specialized institutions) were surveyed to determine the number of R&D staff employed on a full-time and/or part-time (Table 4.4). Data from respondents²⁶ indicated that of the 114 staff engaged in research, 92.1 per cent were employed full-time.²⁷

R&D developments reported for 2014 were in the areas of, inter alia, sustainable agricultural production; variety and breed improvement in crops and livestock, respectively; protection of human and environmental health; and renewable energy.

Agriculture

Select research undertaken by the Ministry of Agriculture and Fisheries Research Stations during the period included:

- propagation and evaluation of clean ginger planting material. Yields from the 2013/14 season at the Montpellier Research Station showed that F1²⁸ rhizomes of the Jamaica yellow and frog blue varieties were capable of producing F2 rhizome yields as high as 1.47kg (3.25lb) per plant²⁹ under nursery

**TABLE 4.3
SELECTED STI CAPACITY BUILDING ACTIVITIES- TRAINING, 2014**

Area	No. of persons trained	Responsible Agency
Post harvest technology; food safety	47	FSPID
Food processing; personal care products	172	SRC
Sugar industry - varieties; fertilizer usage; nutrition management; harvesting efficiency; health & safety; field demonstrations	1450	Sugar Industry Research Industry (SIRI)
Quality management; risk management; accreditation	201	JANAAC
Energy conservation and related areas	630	MSTEM

Source: Compiled from data presented by agencies

24. General requirements for the competence of testing and calibration laboratories

25. Celebrated October 14th of each year

26. Excluding data from universities

27. There is no disaggregation of the number of staff qualified at the PhD Level.

28. The first filial generation or offspring(s) resulting from a cross between strains of distinct genotypes (parental generation)

29. A multiplication ratio per plant of 52 (weight of seed material to harvested yield)

TABLE 4.4
NUMBER OF RESEARCHERS FOR SELECT AGENCIES AND INSTITUTIONS, 2014

Entity	Number of Researchers	
	Full time	Part Time
GOJ Agencies		
Bodles Research Station (MOAF)	51	
Food Storage and Prevention of Infestation Division (MIIC)	13	
SRC (MSTEM)	12	
Specialized Institutions		
ICENS	10	
Tropical Medical Research Institute (TMRI)	19	9
Sub-total		
Total number of researchers	105	9

Source: Compiled from data presented by agencies

conditions. Selection of these higher yielding clones and mass propagation using tissue culture technology should meet the demand for planting material required for commercial production (1.2 tonnes per hectare) and mitigate the impact of rhizome rot. Evaluation of economic best practices for reducing field production costs and improving yields of ginger showed that green manures³⁰ applied at a rate of 10 tonnes per hectare resulted in a 30.0 per cent increase in yields for ginger planted on Shettlewood clay loam. In addition, pre-emergence weed control trials with a broad spectrum phenyl urea-based herbicide proved to be as effective as manual weeding when applied within the first three months of the crop

- expansion of the in situ fruit tree germ plasm at the Bodles Research Station through the addition of five naseberry plants from four varieties, namely Oxtutzcab, Alano, Martin and Gonzalez; ten avocado plants, five each from Bottleneck and Blake varieties; three dwarf cashews and five tall cashews. At the Orange River Research Station, new varieties of Muscadine grape, tropical peach, tropical apple, purple fig and blackberry were introduced
- in the area of IPM for crops under protected cultivation, two natural-product based fungicides and two strains of the entomopathogenic fungus³¹ *Beauveria bassiana* (A & B) were investigated for use against powdery

mildew, thrips and whiteflies. Both agents were effective in lowering the incidence of the target pests on selected crops

- a continuation of research into the impact of intercropping of corn and cow peas showed that both crops planted in the same row will produce a higher level of biomass and significantly higher yields in crude protein content, compared to other row combinations
- implementation of a Government of Jamaica/Food and Agriculture Organization Technical Cooperation to strengthen the monitoring and surveillance programme for the beet armyworm.³² Activities included the development of a pest forecasting system, improvement of on-farm crop and pest management practices through a Farmer Field School and participatory approach, and preparation of the final draft of a National Management Programme. Under a separate programme, the SRC and the MOAF collaborated on the development of Cantharidin³³ as an insecticide for use against the beet army worm. Preliminary results from laboratory studies were generally positive.

In February 2014, the ICENS commenced work on the use of elemental analysis to differentiate the geographical origins of coffee. This survey analyzed samples of roasted and ground coffee and soluble coffee utilizing nuclear and

30. Includes, for example, the leaves of leguminous trees such as *Glyricidia*

31. Colonize the cuticle of insects, eventually reaching the insect's body cavity and killing the host. These fungi can therefore be used as biological control agents

32. The most recent outbreak in May 2012 caused damage to approximately 45.0 ha of crops, including 10.0 ha of onion and 8.0 ha of escallion (valued at \$31 million).

33. A type of terpenoid, is a chemical compound secreted by many species of blister beetle and most notably by the Spanish fly, *Lytta vesicatoria*

related methods. Sixteen elements were selected for statistical evaluation. Preliminary results indicated that both types of coffee preparation appear to cluster around geographical origin, however, the effect was more marked amongst soluble coffee samples. There also appeared to be some separation amongst coffee grown in the Blue Mountain versus non-Blue Mountain regions. A further refinement of this study could see application in the fight against counterfeiting and misrepresentation of Jamaican coffees in domestic and international trade, which cause significant reputational and economic losses to the local industry.

The SRC continued work on the molecular characterization of economically important crops such as Scotch Bonnet pepper and ginger. This work included the optimization of an Amplified Fragment Length Polymorphism (AFLP) protocol for six varieties of Scotch Bonnet pepper and the extraction and amplification of DNA from tissue-cultured ginger and sweet potato. A phylogenetic tree³⁴ was also generated for sweet potato. The DNA profiles from these varietal studies will be used to map pest and disease resistance, as well as provide information on economic viability.

The Sugar Industry Research Institute (SIRI) utilized the SpectraCane technology to analyse over 4 000 potential new varieties for brix, polarization³⁵, purity, moisture and fibre content. The technology allows rapid, detailed analysis of varieties at a much earlier stage of selection, and therefore in much larger numbers, than would otherwise be possible.³⁶ Other research activities undertaken related to the control of orange rust disease, stalk borer, and reducing the negative environmental impacts of sugar cane production and processing. Further strides were made in the containment of the orange rust disease, largely confined to the Worthy Park area. The disease is reported to be on the decline, with the total area sprayed being 780 hectares, down from 1 100 hectares in 2010. Spraying was mainly directed at the BJ7504 variety. The implementation of a Biological Control Programme based on the rearing and release of the parasitic wasp *Cotesia flavipes* to complement the native *Lixophaha diatraeae* and *Agathis stigmaterus*, reduced the stalk borer damage at Shekles in Clarendon. A damage survey in 2014 found that damage was down to 8.8 per cent, from a high of 19.0 per cent at its peak.

Increasing the production and productivity on farms and in agribusiness enterprises in banana dependent areas remained the main focus of the Banana Board. In this regard, work continued in the development of disease and pest resistant banana/plantain crops. The FHIA 17, FHIA 25 bananas, and

FHIA 20 plantain were selected, multiplied and distributed to farmers. Between April and December, approximately 2 028 seedlings were distributed to 118 farmers.

The Animal Identification and Traceability System (AITS) for cattle was launched in November. The system facilitates the tracing of animals, meat and meat products from farm to fork. The implementation of the AITS should help to safeguard public health and boost trade opportunities for meat and meat products. Under the new system, animals are tagged and issued with “passports” to track movement and transfer of ownership. The system is supported by a database which is also expected to provide useful information to aid in animal disease surveillance and the suppression of animal theft.

Energy³⁷

Development of RE technologies and implementation of EE and energy conservation (EC) programmes were the main activities undertaken towards the attainment of national energy goals. The MSTEM reported an average 3.0 per cent decline in energy consumption for public facilities which benefited from refurbishing works under the **Public Sector Energy Efficiency and Conservation Loan Programme** funded by the Government of Jamaica (GOJ) and the Inter-American Development Bank. Works included the application of cool roof solution and solar film, and the installation of energy efficient air conditioning units and lighting (see chapter on Energy, Electricity and Water).³⁸ These efforts were bolstered by training seminars and workshops to build awareness and knowledge amongst key public and private sector stakeholders.

Implementation of the National Energy Policy (NEP) 2009–2030 was also supported through activities executed under the **Energy Security and Energy Efficiency Enhancement Project (ESEEP)**, funded by the GOJ and the World Bank. Under this initiative, prefeasibility and feasibility studies were carried out on four hydro sites. This was accompanied by training of energy sector stakeholders on hydro-financing modelling. Loan funds were provided to SMEs to finance RE and EE projects through a Development Bank of Jamaica (DBJ) Line of Credit. Approximately US\$2.4 million was off-lent through Approved Financial Institutions (AFIs) to 22 entities in the tourism, manufacturing, education, agriculture and service sectors.

Renewable energy development centered on solar, wind, mini-hydro and biomass resources. Power purchase agreements were signed with three preferred bidders to add

34. A tree structure that represents the evolutionary relationships within a group of organisms; prepared using data from molecular sequencing and morphological matrices

35. Brix and polarization are measures of sugar content

36. This will be of particular value in identifying varieties with higher fibre content as the industry places greater emphasis on electricity co-generation to supply the national grid.

37. See chapter on Energy, Electricity and Water

38. These facilities include educational, health and court facilities.

approximately 78.0 MW of RE generating capacity to the grid by 2016.³⁹ This is to be achieved via a mixture of wind and solar photovoltaic (PV) sources. These systems will be located in Munro, St. Elizabeth (wind); Rose Hill, Manchester (wind); and Content Village, Clarendon (solar PV). The feasibility of utilizing wind energy for providing irrigation water to farmers was assessed under the National Irrigation Commission Wind Power Irrigation Project. To this end, wind resource assessment reports were completed utilizing data collected over a 12-month period. Additionally, through the Capacity Development for Energy Efficiency and Security Project (CDEES), funded through a grant from the United Nations Development Programme (UNDP), wind mapping studies were conducted at 22 sites across the island to pilot the use of wind power for domestic use. Based on results of the studies, the Caribbean Maritime Institute was contracted to install and commission wind turbines at two of the sites, namely Rose Hill Primary and Nazareth All Age schools in Manchester.

Activities were initiated under the *Building Capacity and Regional Integration for the Development of a Generation of Entrepreneurs in Sustainable Energy and Information and Communication Technologies (BRIDGE)* programme, being implemented by the UWI. The programme seeks to develop human capital, whilst encouraging gender equality, with a view to meeting expected future demand for technicians, professionals and entrepreneurs in the Sustainable Energy and ICT sectors.

A Solar Market Survey was carried out by the Petroleum Corporation of Jamaica (PCJ) during the reporting period confirmed the need for a public education campaign around solar energy. The study suggested that consumers (household and corporate) were generally aware of solar energy as an alternative, but this awareness did not translate into the use of the technology. It was also found that although financing options were available for solar energy development, there was relatively low utilization of the funds. The main barriers were identified as affordability; insufficient information; and lack of acceptance where respondents felt there was ‘no need for it.’

Health

The UWI established radioecology⁴⁰ laboratory facilities to expand testing capabilities for measuring and mapping radioactivity in Jamaican soils. This additional capacity is to be used for contamination monitoring; radon and health risk assessment of drinking and mineral waters; assessing radioactivity of the human body; and radioactivity of popular Jamaican foods. The university, through its Natural Products

Institute (NPI), also launched an Anti-Cancer Screening Laboratory, dedicated to the screening of Jamaican and Caribbean natural products—including terrestrial and marine plants and microorganisms—for cancer prevention and treatment properties. This screening capability is designed to boost nascent efforts towards the development of a sustainable nutraceuticals industry, grounded in scientific evidence.

Efforts aimed at protecting public health through the mitigation of hazards from the storage and trade of food, grain and feed were supported by the work of the Food Storage and Prevention of Infestation Division. The Division carried out 11 852 inspections and analysed 3 583 samples during the period. This was the equivalent of 639 108.94 metric tonnes of food, valued at \$43 446 million. Of this amount, approximately 25.8 metric tonnes of food/feed were deemed unfit for consumption and mandated for disposal.⁴¹

TECHNOLOGY USE AND TRANSFER

Support by Public STI Agencies

The SRC through its organic tissue culture project with the Jamaica Organic Agriculture Movement (JOAM), multiplied, hardened and handed over ginger and turmeric plantlets. The Council also commenced delivery of three varieties of banana (FHIA 17, 20, 25) to the Banana Board; handed over 100 cassava plantlets to the Caribbean Agricultural Research Development Institute (CARDI); and delivered ginger plantlets to the MOAF. Protocols were also developed for the initiation, multiplication and rooting of ornamental plants.

In the area of product development, 14 new products were developed and 11 food formulations sold by the SRC. The implementation of wastewater management projects was also facilitated; a total of four projects were completed. An additional 36 projects were at various stages of development or construction. Amongst the Council’s clients was the Ministry of Health.

The SRC also facilitated the management of information on STI related issues through the hosting of S&T-related information and training resources. The following came online or were updated during the period:

- Scientific & Technological Information Network (STIN)
- Schools Science & Technology Societies (SSTS)
- New Caribbean Energy Information Service (CEIS)
- Energy For Young Minds (EFYM).

39. The OUR had previously issued a request for proposals in 2012 inviting bids for the supply of up to 115MW of renewable energy electricity generation to the national grid on a Build, Own and Operate (BOO) basis. Selection of preferred bidders took place in 2013.

40. Branch of science which studies the interaction of radioactive substances and the environment, including the uptake into food chains and ecosystems

41. Inspections sites included Government food stores, warehouses, restaurants, supermarkets, distributors, bakeries, factories, ships, break bulk consignments, shipping containers, grain and farm stores.

- CEEDirect
- Tissue Culture Training OnLine
- Expansion of the Innovators Database to include Student Innovations.

The U-Touch Software was developed by UTech in partnership with the Lister Mair Gilby School for the Deaf and the Jamaica Association for the Deaf. The software teaches deaf and hard-of-hearing students a basic component of grammar (prepositions) which are not currently used as part of their Jamaican Sign Language. Version 1 of the U-Touch e-learning software was presented to the Lister Mair Gilby School in February.

Extension and diagnostics services were provided to farmers and other stakeholders by the MOAF Bodles Research Station and the NCU Agriculture Research Centre to boost productivity. The former provided services related to disease screening; pest-related issues (over 400 samples); assessment of nutritional content of feed formulations (over 100 samples); and production of tissue-cultured ginger and root and tuber plants. The NCU Agriculture Research Centre, established jointly with a private bank, reported a 20.0 per

cent increase in demand for analysis of products such as exotic teas, veggie-products, charcoal, soil, yams, potatoes, and vegetables.

Management of Waste

Caribbean Solid Waste Management Conference

The inaugural Caribbean Conference on Solid Waste Management was held in Montego Bay Jamaica, from September 30 to October 3, 2014. The high level event sought to bring focus to the management of waste as a development issue and to raise the profile of solid waste management on the development agenda in Jamaica and the Caribbean (see chapter on Sustainable Development). The conference facilitated the sharing of knowledge, technical information and best practices amongst sector specialists, planners, development agencies and the political directorate from countries in the Caribbean, Latin America and the USA.

The sessions highlighted amongst other things, the resource potential of waste, particularly in the Caribbean context where organics feature prominently in the waste stream. Presentations were facilitated on the application of technology to waste management, including options

TABLE 4.5
RANKING OF SELECTED COUNTRIES IN THE NETWORKED READINESS INDEX, 2009/10–2013/14

Region/Country	2009/10	2010/11	2011/12	2012/13	2013/14
Asia					
Hong Kong	8	12	13	14	8
Japan	21	19	18	21	16
Singapore	2	2	2	2	2
Europe					
Denmark	3	7	4	8	13
Finland	6	3	3	1	1
Iceland	12	16	15	17	19
Sweden	1	1	1	3	3
Latin America and the Caribbean					
Brazil	61	56	65	60	69
Chile	40	39	39	34	35
Barbados	35	38	35	39	55
Jamaica	66	73	74	85	86
Trinidad & Tobago	79	63	60	72	71
Dominican Republic	74	79	87	90	93
North America					
Canada	7	8	9	12	17
United States	5	5	8	9	7
Africa					
Tunisia	39	35	50	n/r	87
South Africa	62	61	72	70	70
Total number of countries	133	138	142	144	148

n/r - not reported

Source: Global Information and Technology report 2014, World Economic Forum and INSEAD

TABLE 4.6
RANKING OF SELECTED COUNTRIES IN THE ICT DEVELOPMENT INDEX 2010 to 2013^a

Region/Country	2010	2011	2012 ^r	2013
Korea (Rep)	1	1	1	2
Japan	8	8	10	11
Singapore	10	14	15	16
China	79	79	78	
Europe				
Sweden	2	2	3	3
Iceland	4	4	4	4
Denmark	3	3	4	1
United Kingdom	14	11	7	5
Latin America and the Caribbean				
Barbados	32	36	32	35
Antigua and Barbuda	44	44	59	57
Chile	58	52	54	56
Trinidad and Tobago	60	63	70	67
Brazil	67	62	67	65
Jamaica	84	93	98	97
North America				
United States	16	17	14	14
Canada	20	20	25	23
Africa				
Tunisia	85	92	96	99
South Africa	90	85	89	90
Kenya ^a	114	116	124	124
Total number of countries in rank	152	157	166	166

a - Report represents the latest available data

r - Revised

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

such as moving grate combustion systems and biodigestors for waste to energy systems. The relationship between waste management and climate change was also explored. Information was provided on opportunities for utilization of climate financing to fund waste management projects such as landfill development.

E-Readiness⁴²

The two indices used to track the country's performance with respect to e-readiness⁴³ are the Networked Readiness Index (NRI), as measured by the annual *Global Information Technology* Report (Table 4.5), and the ICT Development Index (IDI) as reported in the *Measuring the Information Society Report* (Table 4.6). These indices assess parameters such as access to computers; internet access; broadband deployment; mobile phone subscriptions; availability of e-government services; availability of venture capital; effectiveness of law-making bodies; gross tertiary enrolment rate; capacity for innovation; and adult literacy.

Jamaica, with a score of 3.8, slipped one place on the NRI to 86 out of 148 countries. The country's performance in the 10 sub-indices of the NRI compared favorably with the average scores of countries in the Upper-middle-income⁴⁴ group, except on the sub-indices of Individual and Government Usage and Social Impacts. Low performance in these sub-indices should be considered within the context that just under a third of households own working computers (*Jamaica Survey of Living Conditions 2012*) and an even smaller proportion of households (22.6 per cent) have access to the internet. There are ongoing efforts to improve performance in the area of individual and government usage through the establishment of Community Access Points (205 as at December) and Broadband network connected sites (376 as at December) across the island (see chapter on Transport, Storage and Communication), as well-as the continued roll-out of e-government services.

42. This section assesses the country's status on two international ICT indices and highlights major developments in the sector. It examines the level of preparedness to use ICTs to boost competitiveness and well-being.

43. Data from the Measuring the Information Society Report 2014 indicates that 20 out of 38 MDG indicators show significant correlation with the IDI, in particular those related to poverty reduction and health for developing countries surveyed.

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

In keeping with the global trend, Jamaica improved its IDI values to 4.26 (from 4.01) and moved up one place to 97⁴⁵ in the rankings. Jamaica's IDI was below the global average of 4.77.⁴⁶ Improved performance was recorded on the sub-indices of access (increase of 0.12 to 4.58) and use (increase of 0.49 to 2.62). Performance on the sub-index of skills remained steady with a score of 6.89. The country lagged behind regional counterparts Barbados, Antigua and Barbuda and Trinidad and Tobago (see Table 4.6).

Data from the International Telecommunications Union examining internet use by gender revealed that amongst the countries surveyed, Jamaica led with respect to the proportion of female users of the internet⁴⁷. It was noted that 29.8 per cent of women use the internet compared to 25.4 per cent of men, which is contrary to the international norm. The international gender divide as it relates to internet use may be linked to lower levels of education, lack of income and social status for women, especially in developing countries, which can limit access opportunities.

A Cyber Incident Response Team was established in December, in response to the hacking of a number of Government of Jamaica websites (including that of the SRC) in 2014. Technical support for the initiative was provided by the Organization of American States and the Government of Uruguay. A comprehensive National Cyber Security Strategy has been drafted and establishes a framework for boosting cybersecurity.

E-Government ⁴⁸

E-government provides opportunities for improved delivery of public services; enhanced access to information; better business facilitation; greater levels of transparency and accountability; wider public participation in public policy making; and 'greening' of government. The United Nations E-Government Survey 2014 reported that for the first time, all 193 United Nations Member States had national websites, but, the majority of countries were at low or intermediate levels of e-government development. Three critical dimensions were assessed: (i) availability of online services; (ii) telecommunications infrastructure; and (iii) human capacity. Though there was some diversity in the types of transactions reported, setting up of personal online accounts, income tax filing, and business registration were the most commonly reported.

The surveyed reported a correlation between progress in e-government and country income level; the top 25 countries

on the E-Government Development Index (EGDI) were high-income nations. Higher income was shown to translate into increased access to ICT infrastructure and higher education levels (including ICT literacy), although some countries managed to advance despite relatively low national incomes. Other critical success factors were found to be high-level political support and leadership; strengthened institutional capacity; public accountability and citizen engagement; as well as adequate e-government programmes, ICT infrastructure and education.

Jamaica ranked 109 on the EGDI, behind a number of other Caribbean countries. In keeping with its mandate, e-Gov Jamaica Ltd. facilitated the launching of 12 new/improved e-government services⁴⁹ for institutions such as the Island Traffic Authority, Student Loan Bureau, Tax Administration Jamaica (TAJ), and the Jamaica Customs Department. The suite of new or improved services included:

- **Jamaica Customs Agency (JCA) ASYCUDA World**, an automated customs management system. The pilot phase was launched for commercial exports from Port Bustamante (Kingston Container Terminal and Kingston Wharves Ltd) in December. Exporters will use dual submissions until the old system is phased out
- **Tax Administration Jamaica Revenue Administration Information System (RAiS)**, a configurable, commercial (off-the-shelf) tax administration system that is to replace the custom-built integrated tax administration system currently in use by the TAJ. The system facilitates access to information and transaction of business through a web-based Taxpayer Access Point (TAP). Functionality includes viewing of filing/payment history and notices sent by the administration, online application for all General Consumption Tax (GCT) refunds, making payment arrangements, and submitting notices of objection
- **JCA eManifest**, an electronic cargo manifest system implemented at the Freeport and the Seaboard Warehouses (Montego Bay). It allows the processing of cargo manifests submitted electronically by shipping agents, freight forwarders and Non-Vessel Operating Common Carriers (NVOCC)
- **Road Operations Management System (ROMS)**, which allows the Transport Authority to manage in-field operations. Features include scheduling

45. Ranking for IDI 2011 (which is reported on in 2012) was revised to 98 from 89

46. Within a theoretical range of 0 to 10

47. United Nations E-Government Survey 2014

48. E-government relates to the use of ICT and its application by the government for the provision of information and public services to the people. It includes electronic interactions of three types (i) government-to-government (G2G); (ii) government-to-business (G2B); and (iii) government-to-consumer (G2C).

49. Since 2013 e-Gov Jamaica Ltd. has facilitated 34 services going online

TABLE 4.7
TELE-DENSITY IN JAMAICA, 2010–2014

Year	Population	Landlines	Mobile	Total	% Fixed line penetration	% Mobile Penetration
2010	2 705 800	284 285	3 181 995 ^r	3 466 280	10.5	117.6
2011	2 704 100	270 068	2 945 395	3 215 463	10	108.9
2012 ^r	2 711 500	253 143	2 714 938	2 968 081	9.3	100.1
2013 ^p	2 718 000	250 340 ^r	2 846 196 ^r	3 096 536 ^r	9.2	104.7
2014	2 723 200	253 595 ^p	2 880 589 ^p	3 134 184	9.3	105.8

p - preliminary figures to September 2014

r - revised to reflect end of year figures

Source: Office of Utilities Regulations and STATIN

of inspectors, document verification, managing compliance actions (e.g. warnings and summons). Inspectors can access the system using tablet devices

- **Student’s Loan Bureau Loan Management System (LMS)**, which facilitates loan creation, manipulation and monitoring. It features modules for front and back-end cashiering, portfolio management, loan restructuring, waivers, and a full reporting suite.

Teledensity⁵⁰

Teledensity, computer ownership, and internet access provide information on ICT penetration and/or uptake at the household level. Jamaica’s teledensity rate has remained consistently above 100 per cent in recent times. In 2014, it increased to 115.1/100 population, up from 113.9/100 population⁵¹ in 2013. This performance was primarily due to the 105.8/100 population mobile penetration rate (Table 4.7), which was on par with average levels reported for the Americas⁵² (107/100 population in 2013). Notwithstanding Jamaica’s relatively high teledensity rate, there are still persons without telephone access. This can be attributed to issues such as the uneconomical cost to service some locations and the inability of some persons to afford available services.

Electronic Banking Transactions

Access to and use of electronic banking facilities⁵³ is indicative of an enhanced level of business sophistication, enabled by the use of ICTs. Automated Banking machines (ABM) and point of sale (POS) machines facilitate expanded

access to financial services and present convenient, efficient and cost-effective options to customers.

The volume and value of Jamaican and US dollar processed by commercial banks has been increasing over the last three years, according to data collected by the Bank of Jamaica. The combined value of transactions processed in 2014 was \$756.9 billion for JMD transactions and \$699.1 million for USD transactions (Table 4.8a & 4.8b). These figures reflected respective increases of approximately 14.0 and 13.3 per cent relative to 2013, and correlate to a steady rise in the volume of transactions at ABM and POS terminals for both dollar denominations.⁵⁴

E-learning

The e-Learning Jamaica Company Ltd. implemented two sub-projects of the e-Learning project, the e-Learning (high school) and Tablets in School (TIS) initiatives. These projects aim to utilize ICT to improve the quality of education and to enhance the learning experience through infrastructure upgrades, training and materials development. A total of 18 725 tablets were distributed to students and 1 114 to teachers in 35 schools.⁵⁵ Contracts were signed with 19 companies to provide educational resources for the tablets.

INNOVATION

Global Innovation Index (GII)⁵⁶

Ranking on the GII was based on performance in five innovation input pillars: (i) Institutions, (ii) Human capital and research; (iii) Infrastructure; (iv) Market sophistication;

50. Number of telephone (mobile and landline) connections per 100 population

51. Revised from ESSJ 2013 figure of 112.1/100 population

52. Measuring the Information Society Report, 2014. The Americas includes North America, South America and the Caribbean regions

53. Data is provided for ABM and Point of Sale transactions only

54. ABM density was 23.8/100 000 population, ESSJ 2013. The parishes of St. Andrew, St. Catherine and St. James had the largest number of machines.

55. Under the pilot project 25 000 tablets are to be distributed to 38 schools.

56. Assesses the degree to which a country’s economy enables innovative activities and generates innovation outputs

TABLE 4.8a
VOLUME AND VALUE OF JMD ABM AND POINT OF SALE TRANSCATIONS PROCESSED BY COMMERCIAL BANKS FOR JANUARY TO NOVEMEBER PERIOD, 2012–2014

	2012		2013		2014		Percentage Change 2014/13	Percentage Change 2014/13
Volume (Mn)	Value (Bn)	Volume (Mn)	Value (Bn)	Volume (Mn)	Value (Bn)	Volume (Mn)	Value (Bn)	
ABM Terminals	46.1	387.3	51.5	460.5	55.6	514.1	8.0	11.6
Point of Sale Terminals	25.7	173.2	28.2	203.7	30.3	242.8	7.4	19.2
TOTAL	71.8	560.5	79.7	664.2	85.9	756.9	7.7	14.0

Source: Bank of Jamaica Payment System Data Bulletin, December 2014

TABLE 4.8b
VOLUME AND VALUE OF USD ABM AND POINT OF SALE TRANSCATIONS PROCESSED BY COMMERCIAL BANKS FOR THE JANUARY TO NOVEMBER PERIOD, 2012–2014

	2012		2013		2014		Percentage Change 2014/13	Percentage Change 2014/13
Volume (000)	Value (Mn)	Volume (000)	Value (Mn)	Volume (000)	Value (Mn)	Volume (Mn)	Value (Bn)	
ABM Terminals	293.8	74.4	336.8	89.7	396.6	112.7	17.8	25.6
Point of Sale Terminals	2 042.0	469.0	2 285.7	527.1	2 448.9	586.4	7.1	11.2
TOTAL	2 335.8	543.4	2 622.5	616.8	2 845.5	699.1	8.5	13.3

Source: Bank of Jamaica Payment System Data Bulletin, December 2014

and (v) Business sophistication and two output pillars: Knowledge and technology outputs; and Creative outputs. A total of 143 territories were assessed in 2014. High income countries continued to rank in the top 10 of the GII (Table 4.9), essentially due to the level of resources committed to funding education; building institutions; developing infrastructure; and importantly, R&D and innovation systems.

Jamaica, with a score of 32.4 was ranked 82 of 143 countries. The country continued to perform better in the sub-indices of innovation input than in those related to innovation output, resulting in an Innovation Efficiency Ratio of 0.7.⁵⁷

The number of publications and patents are useful indicators of innovative output, providing insight into the level of knowledge creation and research productivity. The number of research publications reported for 2014 was 148.⁵⁸ This was higher than the annual average over the 2009–2013 period. Outputs were mainly in the areas of Environmental

Science and Ecology, Chemistry, Occupational Health and Paediatrics.⁵⁹

Patent statistics collated by the Jamaica Intellectual Property Office (JIPO) for 2014 indicate that 33 of the 155 applications were filed by residents (Table 4.10). The domestic filings continued on an upward trend for the past five years, suggesting an increase in innovative output. Notwithstanding, the percentage of local filings seem disproportionately low compared with the World Intellectual Property Office (WIPO) estimate (2012) that resident filings accounted for 65.0 per cent of global patent applications. Consistent with the recent trend, pharmaceuticals accounted for the largest proportion (82.1 per cent) of all patents granted.

Public awareness and education on Intellectual Property protection, buttressed by an appropriate legal and institutional framework are essential for creating the needed environment to stimulate innovation. The annual National Innovation

57. Ratios of less than 1.0 (Output Sub-index over Input sub-index) would mean that the level of innovation outputs is less than the level of innovation inputs

58. Thomas Reuters Web of Science™ research platform used for publication counts does not distinguish between research carried out in Jamaica and address of Author at the time of publishing, although the latter is likely to be very small.

59. Web of Science™ database collates information on the following: articles, abstracts, reviews, editorials, letters, meetings, corrections, news and bibliographies

TABLE 4.9
RANKING OF SELECTED COUNTRIES IN THE GLOBAL INNOVATION INDEX, 2010–2014

Region/Country	2010	2011	2012	2013	2014
Asia					
China	43	29	34	35	29
India	56	62	64	66	76
Singapore	7	3	3	8	7
Republic of Korea	20	16	21	18	16
Europe					
Sweden	2	2	2	2	3
Switzerland	4	1	1	1	1
Finland	6	5	4	6	4
United Kingdom	14	10	5	3	2
Latin America and the Caribbean					
Barbados	68	47	58	47	41
Brazil	42	38	39	64	61
Chile	42	38	39	46	46
Jamaica	70	92	91	82	82
Trinidad & Tobago	55	72	81	81	90
North America					
Canada	12	8	12	11	12
United States of America	11	7	10	5	6
Africa					
Nigeria	96	96	123	120	110
South Africa	51	59	54	58	53
Tunisia	62	66	59	70	77
Total number of countries in ranking	132	125	141	142	143

Source: INSEAD, World Intellectual Property Office and Cornell University

TABLE 4.10
PATENTS FILED AND GRANTED IN JAMAICA FOR SELECTED COUNTRIES, 2010–2014

Country	Applications 2010	Granted Applications 2011	Granted Applications 2012	Granted Applications 2013	Granted Applications 2014	Granted
Jamaica	13	2	20	5	25	0
United States	33	20	16	11	22	7
Canada	2	0	4	0	1	0
Germany	17	5	17	7	24	3
England	3	7	3	3	6	6
Other	87	4	53	22	29	4
Total	155	38	113	48	107	20

Source: Jamaica Intellectual Property Office

Awards, 2014 highlighted the work of local innovators, and create opportunities for networking with potential investors. Eleven inventions were recognized in nine categories (Box 3). Following on the 2014 awards function, an Innovator Venture Support Meet Up was organized by the MSTEM and NCST in December 2014, to further facilitate partnerships between potential investors and innovators.

BOX 3. NATIONAL INNOVATION AWARDS - SELECT CATEGORY WINNERS FOR 2014:

Health & Safety

Ortanique peel PMFs extract (PMFORT©) for hypercholesterolemia (high cholesterol): A cost-effective alternative of natural origin, for the treatment of hypercholesterolemia without the side effects exhibited by conventional hypolipidemic³ drugs. Also expected to contribute to alleviating the negative impact of improper disposal of citrus peel waste.

ICT

Branditise: a cloud-based suite of digital marketing tools that enables its clients to effectively manage their social media and other digital channels.

Engineering and Manufacturing

Active Regulator Generator (ARG): a power factor correction system which allows appliances to use less energy. ARG is designed to give the user the ability to manage the voltage and frequency of the power going to an appliance regardless of what is being received from the outlet.

Education and Popularization of Science and Technology

My Locker e-Learning Platform and Courses: One-on-One Tutoring Services which provide personalized education, tutoring and e-learning solutions to a wide range of stakeholders. The platform is equipped with the most advanced e-learning technology – Tin CANAPI. The aim is to improve the overall literacy and performance in key subject areas.

Environmental Sustainability

Earthquake Resistance Construction using Bamboo: the application of specific preservation and engineering techniques to make local bamboo (*Bambusa vulgaris*) suitable for construction of permanent, disaster resilient buildings.

Youth Innovator

CRIMEBOT: App currently available on Android platform, which allows users to anonymously report crime and criminals. It also offers crime hotspot mapping as well as live incident notifications. The desired outcome is to create and maintain a safe and secure environment for each and every citizen.

OUTLOOK

STI-driven growth will continue to be a focus of the government. The development of a comprehensive STI policy is expected to identify critical drivers and success factors to enable the integration and popularization of STI at all levels of the society. It will articulate strategies to stimulate innovation and entrepreneurship; improve business facilitation and incubation; and strengthen researcher-government-private linkages. This inclusive process is expected to propose solutions appropriate to the current country context that will allow STI potential to be developed and exploited to sustain socio-economic growth.

Continued research and development of renewable energy technologies; investments in public sector energy efficiency and conservation programmes; and incentivizing private sector participation through, for example, the development of Energy Services Companies (ESCOs), will continue to feature in the government's strategies to meet short and longer term energy targets.

The development of STEM education and innovation driven industries will be brought into sharper focus, to allow Jamaica to tap into the significant global opportunities that are available. The strides that have been made with respect to the policy environment and investments in STEM and Technical, Vocational Education and Training (TVET) education are expected to enhance Jamaica's prospects at successfully realizing gains in areas such as health and wellness tourism, nutraceuticals, pharmaceuticals, agri-business and ICT-driven industries such as digital animation, robotics and business process outsourcing (BPO).

The development of ICTs will also remain high on the public agenda. Through the Universal Services Fund, there is expected to be a continued build-out of the island-wide broadband network and establishment of CAPs. Promotion of the use of Free and Open Source Software (FOSS) aimed at reducing reliance on costly proprietary software should address one of the major constraining factors to government ICT use. Proposed changes to the current administrative and policy framework, through the establishment of single ICT regulator, review of the ICT (2011) policy and implementation of the National Cyber Security Framework is expected to strengthen these efforts. ■

THE MACRO ECONOMY



Developing a Venture Capital Ecosystem in Jamaica.

Photograph contributed by IDB



GROSS DOMESTIC PRODUCT

INTRODUCTION

Total Real Value Added¹ for the Jamaican economy was \$ 735 277.0 million (Table 5.1). This represented an increase of 0.4 per cent relative to 2013 (Figure 5A). The out-turn for 2014 was driven by a 0.5 per cent expansion in real value added for the Services Industry, for which six of the eight industries grew. Of the six industries which expanded, the largest contributors to the overall positive out-turn were the Hotels & Restaurants; Transport, Storage & Communication; and Other Services industries. Combined, these industries accounted for 0.4 percentage point of Total Real Value Added growth. The Goods Producing Industry was estimated to have contracted, due mainly to lower real value added for the Agriculture, Forestry & Fishing and Manufacture industries.

The increase in Total Real Value Added reflected mainly the impact of:

- Improved economic performance of Jamaica’s main trading partners which resulted in increased demand for some Jamaican goods and services.
- Growth in maritime and air transport related activities, reflected in increases in the volume of cargo handled and passenger movement.

- Increased civil engineering and non-residential construction activities, specifically related to the construction of segments of the North-South Link of Highway 2000, as well as hotel renovation and construction.

Economic growth during the year occurred against a background of several developments which supported the improved performance. These included:

- Improved business and consumer confidence – Business confidence grew due to increased optimism about current economic conditions and future prospects. A higher level of consumer confidence emanated from the belief that the policies currently being pursued by the Government of Jamaica (GoJ) were necessary to engender economic growth and job creation, despite the impact of fiscal consolidation.
- Indication of confidence in the economic programme by external investors was evident in improved sovereign credit rating as international credit rating agency Standard & Poor’s revised upwards its outlook on Jamaica’s long-term sovereign credit rating to positive from stable; and the oversubscription of an external bond floated by the GoJ in July².

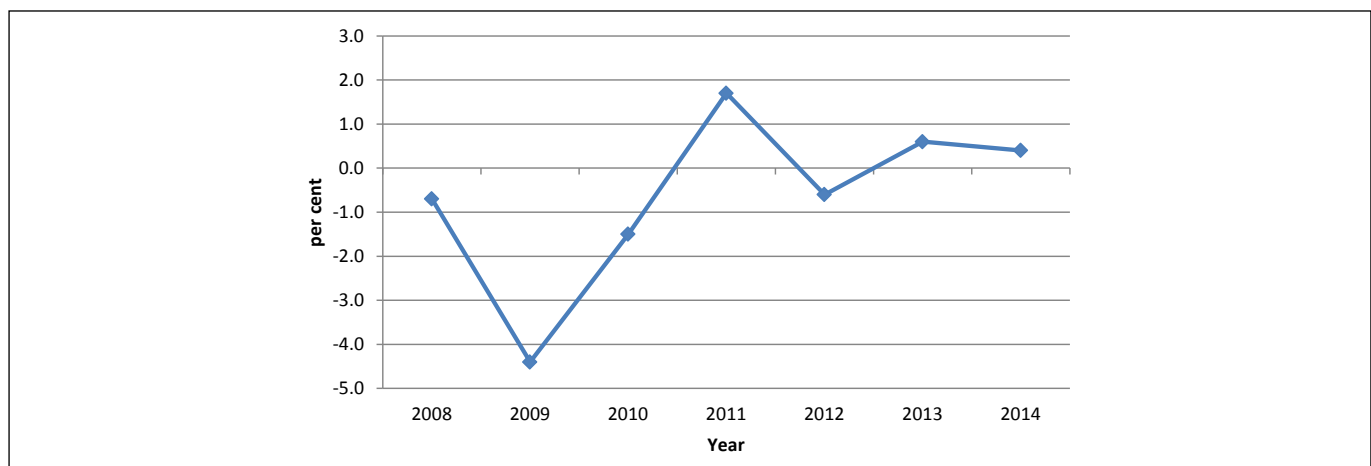


FIGURE 5A: CHANGE IN REAL GDP FOR THE JAMAICAN ECONOMY 2008–2014

1. Due to the unavailability of Real GDP data at the time of writing, Total Gross Value Added in Basic Values at Constant Prices (Total Real Value Added) is used as a proxy for Real GDP. Real GDP = Total Value Added in Basic Values at Constant Prices + Taxes Less Subsidies on Products.

2. The Ministry of Finance had initially intended to raise US\$500.0 million, but managed to raise US\$800.0 million in the July 2014 external bond float.

TABLE 5.1
VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES 2010–2014
(\$MILLION)

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p
GOODS PRODUCING INDUSTRY	173 518.7	182 404.1	179 200.3	179 914.0	179 783.6
Agriculture, Forestry & Fishing	43 747.3	48 261.3	49 384.0	49 041.7	48 824.5
Mining & Quarrying	14 968.6	17 823.4	16 272.9	16 715.7	16 866.5
Manufacture	61 635.7	62 710.2	62 290.5	61 948.7	61 178.4
of which: Food, Beverages & Tobacco	33 178.0	34 087.9	34 483.0	34 612.3	34 858.5
Other Manufacturing	28 457.7	28 622.3	27 807.5	27 336.4	26 319.9
Construction	53 167.1	53 609.2	51 252.8	52 207.8	52 914.2
SERVICES INDUSTRY	582 497.6	582 420.0	581 303.2	581 910.6	584 991.9
Electricity & Water Supply	24 165.2	24 227.1	23 704.9	23 242.2	22 972.5
Transport, Storage & Communication	81 994.7	80 448.6	80 393.1	80 743.3	81 625.3
Wholesale & Retail Trade; Repair and Installation of Machinery	131 075.0	131 517.6	129 633.7	129 474.7	129 758.7
Finance & Insurance Services	81 228.3	81 024.4	81 602.2	81 900.1	82 088.9
Real Estate, Renting & Business Activities	79 184.5	78 895.2	78 514.1	78 772.8	79 177.7
Producers of Government Services	96 344.9	96 830.4	96 666.5	96 430.4	96 242.0
Hotels and Restaurants	38 841.0	39 618.5	40 322.6	40 788.0	41 965.0
Other Services	49 664.2	49 857.9	50 466.1	50 559.0	51 161.8
Less Financial Intermediation Services Indirectly Measured (FISIM)	31 914.9	30 594.3	29 699.7	29 576.4	29 498.5
TOTAL GROSS VALUE ADDED AT BASIC PRICES	724 101.4	734 229.7	730 803.8	732 248.2	735 277.0
Taxes Less Subsidies on Products	103 473.8	107 420.0	106 073.3	109 328.7	n/a
GDP AT MARKET PRICES	827 575.2	841 649.7	836 877.1	841 576.9	n/a

p - preliminary

r - revised

n/a - not available

Source: Statistical Institute of Jamaica

— Increased employment levels – The average employment level increased by 19125 to 1128050 persons. Correspondingly, the average unemployment rate fell to 13.7 per cent, which was 1.5 percentage points lower than the average for 2013 (see chapter on Labour Market).

Growth was, however, constrained by developments within the domestic environment. These included drought conditions which hampered agricultural planting activities and yield; and industrial plant downtime.

ECONOMIC POLICY FRAMEWORK

Macroeconomic policy for FY2014/15 was guided by the GoJ's Growth Agenda which aims to re-orient economic policy towards enhancing growth as the necessary basis for realizing sustained improvements in the social well-being of the population. The Growth Agenda provides the framework to systematically address binding structural constraints and achieve sustainable economic growth with social equity consistent with the goals of Vision 2030 Jamaica. The components of the Growth Agenda are:

— Fiscal Consolidation – aimed at providing macroeconomic stability through deficit reduction; prudent debt management; tax reform; fiscal accountability; public sector transformation; pension reform; financial sector stability; and inflation control. Two significant initiatives aimed at improving fiscal accountability, were undertaken during the year. These were the passing of the Fiscal Rule legislation and the preparation of the Public Sector Investment Programme (PSIP) Policy Paper to cabinet. The fiscal rules legislation involves two Acts³ which seek to bolster transparency within the economy and ensure a sustainable budget. The PSIP Policy Paper guides the prioritization of strategic capital projects for inclusion in the annual budget.

— Business Environment Competitiveness Reforms – is intended to unleash entrepreneurial dynamism by addressing constraints in the business environment. Reducing the transaction costs of doing business as well as modernising the legal and commercial architectural framework of the business environment

3. The Public Bodies Management and Accountability (Amendment) Act, 2014 and the Financial Administration and Audit (Amendment) Act, were enacted in March, 2014.

are elements of this component. Accordingly, during the year, initiatives included:

- The passing in October of the Insolvency Act – which seeks to reform the insolvency framework to allow for a more efficient mechanism for the liquidation and rehabilitation of bankrupt businesses.
- Cabinet approval of reforms to the Development Applications Process – the new process will result in a faster, more streamlined approvals process.
- Roll-out of a single registration form for businesses – The ‘business super form’ approved in December 2013, was rolled out in January 2014. To facilitate the registration of businesses at a single location, the electronic interface between the Companies Office of Jamaica and the Tax Administration Jamaica was effected in April.
- Strategic Investment Projects – this involves the facilitation of catalytic capital investments and employment creation. Among these projects are: the Global Logistics Hub Initiative; Agro-Parks; ICT Parks; Road Infrastructure Projects; and Integrated Resort Development. Critical to improving competitiveness are energy sector projects which are targeted to reduce the cost of energy; achieve fuel-source diversification; facilitate energy conservation; and liberalize the electricity market.
- Human Capital Development, Social Protection & Security – this involves social inclusion through strategies to improve labour productivity; strengthen economic resilience at the individual and community levels; enhance social protection; and address crime and violence. To this end, the Social Protection Strategy was launched in 2014 and aims to strengthen the State’s existing social protection framework by streamlining the provision and allocation of social resources and other interventions by the Government (see chapter on Social Development, Social Protection and Culture). The Employment (Flexible Work Arrangements) (Miscellaneous Provisions) Act, 2014, was passed and was aimed at increasing employment opportunities and enhancing productivity.
- Environmental Resilience – this is targeted towards enhancing environmental resilience and reducing the impact of disasters and climate change, through projects aimed at strengthening the built and natural environment.

Consistent with elements of the Growth Agenda, is the Memorandum of Economic and Financial Policies (MEFP) FY2013/14-FY2016/17 which accompanied the Letter of Intent under the Extended Arrangement with the International

BOX 1: SELECTED QUANTITATIVE PERFORMANCE CRITERIA AND STRUCTURAL BENCHMARKS FOR FY 2014/15

Quantitative performance criteria in the MEFP of the Extended Arrangement with the IMF, consisted of 11 fiscal and monetary targets. For FY 2014/15 these included cumulative balances as at March 2015 of:

- Primary balance of the Central Government – \$122.0 billion
- Tax Revenues (floor) – \$384.0 billion
- Overall balance of the Public Sector – \$384.0 billion
- Social Spending (floor) – \$21.7 billion
- Cumulative change in the Net International Reserves – \$529.4 billion

The Structural Benchmarks were related to institutional fiscal reforms, tax reform, tax administration, financial sector reforms and growth enhancing structural reforms. Among the structural benchmarks to be completed during FY2014/15 were:

- Institutional fiscal reform
 - Revise the relevant legislation for the adoption of a fiscal rule to ensure a sustainable budgetary balance, to be incorporated in the annual budgets starting with 2014/15 budget
- Tax reform
 - Amendments to the GCT Act are to be tabled in parliament by June 2014. The main objectives of the reform of the General Consumption Tax (GCT) are to broaden the tax base and improve its administration. Key elements will be effective as of July 1, 2014.
- Tax Administration
 - Government to make e-filing mandatory for Large Tax Office clients with respect to General Consumption Tax (GCT) and Corporate Income Tax (CIT)
- Financial Sector
 - Government to table the Omnibus Banking Law (referred to as the Banking Services Bill) consistent with the Fund Staff advice to facilitate effective supervision of the financial sector.

Monetary Fund (IMF). The MEFP aims to facilitate sustained economic growth through combined initiatives focused on engendering a sustainable downward trajectory of public debt; improving competitiveness; facilitating private sector-led growth; and protecting social spending and strengthening the social safety net. The MEFP is monitored quarterly through quantitative performance criteria (QPC) and several structural benchmarks, the successful completion of which facilitates disbursements under the Agreement (Box 1).

Additional macroeconomic targets for FY 2014/15 included:

- GDP growth of 1.4 per cent
- inflation within the range of 7.0 per cent to 9.0 per cent
- current account balance of 8.0 per cent of GDP.

During 2014, the IMF completed four quarterly reviews of Jamaica's macroeconomic programme for the periods October–December 2013, January–March, April–June and July–September, 2014. Jamaica satisfied all quantitative targets and structural benchmarks outlined in the Arrangement under the EFF. This facilitated the combined disbursement of approximately US\$277.9 million. As at December 2014, Jamaica had successfully completed six quarterly assessments since the start of the programme in FY 2013/14, bringing the total disbursements received under the programme to approximately US\$546.39 million.

INDUSTRY PERFORMANCE

Agriculture, Forestry & Fishing

The Agriculture, Forestry & Fishing industry was estimated to have contracted by 0.4 per cent relative to 2013. The industry's share of GDP decreased by 0.1 percentage point to 6.6 per cent. Despite this, the industry remained the second largest employer, employing an average of 207 850 persons, 5 500 more than in 2013.

Real value added out-turn for 2014 reflected contrasting performances for the first and second halves of the year. In the first half, output increased amidst favourable weather conditions vis-à-vis the lingering effects of Hurricane Sandy and drought conditions which impacted the performance of the corresponding period of 2013. In the latter half of the year, drought conditions constrained output. Movement in the Planning Institute of Jamaica's Agriculture Production Index revealed decreased output from the categories, Other Agricultural Crops (down 7.6 per cent); Post Harvest Activities (down 25.0 per cent); and Fishing (down 0.7 per cent). The categories which recorded higher output levels were Traditional Export Crops (up 30.5 per cent) and Animal Farming (up 4.4 per cent).

Mining & Quarrying

Real value added for the Mining & Quarrying industry grew by 0.9 per cent compared with 2013. This improved performance was above the average out-turn for the last five years (Table 5.2). The industry accounted for 2.3 per cent of Total Value Added. The increase in real value added was due primarily to the performance of the Mining sub-industry and

TABLE 5.2
YEAR OVER YEAR CHANGE OF GROSS VALUE ADDED BY INDUSTRY AT CONSTANT (2007) PRICES, 2010–2014
(PER CENT)

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	Average ^a 2009–2013 ^r	Contribution to Growth in 2014 Percentage Pts.
GOODS PRODUCING INDUSTRY	-2.2	5.1	-1.8	0.4	-0.1	-1.7	0.0
Agriculture, Forestry & Fishing	0.0	10.3	2.3	-0.7	-0.4	3.8	0.0
Mining & Quarrying	-4.2	19.1	-8.7	2.7	0.9	-12.8	0.0
Manufacture	-4.1	1.7	-0.7	-0.5	-1.2	-1.7	-0.1
of which: Food, Beverages & Tobacco	-1.3	2.7	1.2	0.4	0.7	-0.8	0.0
Other Manufacturing	-7.1	0.6	-2.8	-1.7	-3.7	-2.7	-0.1
Construction	-1.3	0.8	-4.4	1.9	1.4	-4.3	0.1
SERVICES INDUSTRY	-1.9	0.0	-0.2	0.1	0.5	-0.6	0.4
Electricity & Water Supply	-4.3	0.3	-2.2	-2.0	-1.2	-0.7	0.0
Transport, Storage & Communication	-2.7	-1.9	-0.1	0.4	1.1	-2.2	0.1
Wholesale & Retail Trade; Repair and Installation of Machinery	-3.8	0.3	-1.4	-0.1	0.2	-1.8	0.0
Finance & Insurance Services	-3.4	-0.3	0.7	0.4	0.2	0.6	0.0
Real Estate, Renting & Business Activities	-1.0	-0.4	-0.5	0.3	0.5	-0.3	0.1
Producers of Government Services	0.3	0.5	-0.2	-0.2	-0.2	0.1	0.0
Hotels and Restaurants	3.4	2.0	1.8	1.2	2.9	2.3	0.2
Other Services	-1.4	0.4	1.2	0.2	1.2	0.2	0.1
Less Financial Intermediation Services Indirectly Measured (FISIM)	-12.7	-4.1	-2.9	-0.4	-0.3	-3.7	0.0
TOTAL GROSS VALUE ADDED AT BASIC PRICES	-1.5	1.4	-0.5	0.2	0.4	-1.0	0.4
Taxes Less Subsidies	-1.7	3.8	-1.3	3.1	n/a	n/a	n/a
GDP AT MARKET PRICES	-1.5	1.7	-0.6	0.6	n/a	n/a	n/a

p - preliminary

r - revised

n/a - not available

a - average calculated using the geometric mean

Discrepancies in the Contribution to Growth section are due to rounding

was influenced by an uptick in global demand. A 2.8 per cent growth in crude bauxite production to 4 818.1 kilo tonnes at the Noranda Bauxite Company reflected the impact of higher demand. Consistent with the increase in bauxite production, the Bauxite Capacity Utilization Rate increased to 91.8 per cent, up from 89.3 per cent in 2013. Alumina production, however, fell by 0.2 per cent to 1 851.0 kilo tonnes, owing to several challenges, among which were, the unplanned closure of WINDALCO's Ewarton plant to facilitate maintenance activities; and efficiency issues arising from a lower quality of bauxite extracted by JAMALCO. For the review period, the Alumina Capacity Utilization Rate was 41.6 per cent compared with 41.7 per cent in 2013.

The Industrial Minerals sub-industry was also estimated to have increased due to higher levels of output of five of eight commodities. These were limestone & whiting, sand & gravel, marl & fill, pozzolan & shale and clay. Output levels of gypsum and marble decreased while the volume of silica sand produced remained unchanged.

Manufacture

The Manufacture industry declined by 1.2 per cent and detracted 0.1 percentage point from total GDP. The industry's share of total GDP decreased to 8.3 per cent, from 8.5 per cent in 2013 (Table 5.3). Lower output reflected weakened demand and supply-related constraints. The industry's performance stemmed from a 3.7 per cent contraction in the Other Manufacture component, which outweighed growth of 0.7 per cent in the Food, Beverages & Tobacco sub-industry.

The decline in output in Other Manufacture resulted from the lower production of:

- Chemicals & Chemical Products – influenced, in part, by reduced demand for products such as fertilisers, aluminium sulphate and paint.
- Petroleum Products – impacted by the partial closure of Petrojam Limited for ten weeks to facilitate the maintenance of the refinery.

Construction

The Construction industry recorded growth of 1.4 per cent. This increase in real value added resulted from expansions in the Other Construction and Building Construction components of the industry. Consequent on this performance, the industry contributed 0.1 percentage point to GDP growth and accounted for 7.2 per cent of total economic output.

With respect to the Other Construction component of the industry, growth was due to increased civil engineering activities associated primarily with the construction of the North South segment of Highway 2000. Additionally, there was increased expenditure on the telecommunications network and on the rehabilitation of port infrastructure. Increased activity within Building Construction was driven by non-residential building projects, specifically hotel construction and renovation, in addition to the building construction projects to facilitate the expansion of the Business Processing Outsourcing industry. Residential construction was estimated to have declined, evidenced by a fall-off in housing starts and completions.

TABLE 5.3
CONTRIBUTION TO GROSS DOMESTIC PRODUCT IN BASIC VALUES AT CONSTANT (2007) PRICES, 2010–2014
(PER CENT)

	2010	2011	2012	2013 ^r	2014 ^p
GOODS PRODUCING INDUSTRY	24.0	24.8	24.5	24.6	24.5
Agriculture, Forestry & Fishing	6.0	6.6	6.8	6.7	6.6
Mining & Quarrying	2.1	2.4	2.2	2.3	2.3
Manufacture	8.5	8.5	8.5	8.5	8.3
of which: Food, Beverages & Tobacco	4.6	4.6	4.7	4.7	4.7
Other Manufacturing	3.9	3.9	3.8	3.7	3.6
Construction	7.3	7.3	7.0	7.1	7.2
SERVICES INDUSTRY	80.4	79.3	79.5	79.5	79.6
Electricity & Water Supply	3.3	3.3	3.2	3.2	3.1
Transport, Storage & Communication	11.3	11.0	11.0	11.0	11.1
Wholesale & Retail Trade; Repair and Installation of Machinery	18.1	17.9	17.7	17.7	17.6
Finance & Insurance Services	11.2	11.0	11.2	11.2	11.2
Real Estate, Renting & Business Activities	10.9	10.7	10.7	10.8	10.8
Producers of Government Services	13.3	13.2	13.2	13.2	13.1
Hotels and Restaurants	5.4	5.4	5.5	5.6	5.7
Other Services	6.9	6.8	6.9	6.9	7.0
Less Financial Intermediation Services Indirectly Measured (FISIM)	4.4	4.2	4.1	4.0	4.0
TOTAL GDP AT BASIC PRICES	100.0	100.0	100.0	100.0	100.0

p - preliminary

r - revised

Discrepancies due to rounding

Source: Statistical Institute of Jamaica

Electricity & Water Supply

Real value added for the Electricity & Water Supply industry decreased by 1.2 per cent. The industry's share of GDP declined by 0.1 percentage point to 3.1 per cent. Lower value added reflected contractions in both electricity consumption and water production. Electricity consumption declined by 1.3 per cent to 3 021.5 GWh due to a decrease in demand. Consistent with the fall-off in consumption, electricity generation also fell, down 0.8 per cent to 4 107.5 GWh. This reflected lower generation from non-Jamaica Public Service (JPS) sources which outweighed growth in JPS generation. Water production fell by 0.6 per cent to 296 139.5 megalitres, reflecting lower output from Kingston & St. Andrew, Clarendon, Trelawny and St. Elizabeth. Lower production resulted from drought conditions, particularly during the second and third quarters of the year.

Transport, Storage & Communication

The Transport, Storage & Communication industry recorded a 1.1 per cent increase in real value added. The industry's share of GDP was 11.1 per cent. Improved real value added stemmed from increased activities in both the Transport & Storage and Communication sub-industries. The out-turn for the Transport & Storage component resulted from increased maritime and air transport activities, evidenced by:

- a 2.3 per cent rise in cargo volume to 15 424 million tonnes

- a 4.6 per cent increase in passenger movement to 5 087 171 persons.

There was, however, a 2.9 per cent fall-off in the number of vessel visits to 3 470 consequent on a decline in vessel visits to Outports. With respect to Communication, the improved performance reflected the impact of increased competition among service providers which resulted in an increase in minutes sold.

Wholesale & Retail Trade; Repair and Installation of Machinery (WRTRIM)

The WRTRIM industry grew by 0.2 per cent. In 2013, a contraction of 0.1 per cent was recorded. The industry was the largest for 2014, accounting for 17.6 per cent of GDP and employing 226 425 persons, the largest of any industry. The higher real value added was facilitated by increases in: the volume and value of Point of Sales and Automatic Banking Machines (ABM) transactions; the stock of Loans and Advances to consumers and distributors; and remittance inflows. The industry was also positively impacted by higher levels of consumer and business confidence.

Analysis of preliminary General Consumption Tax (GCT) returns filed revealed that there were increased sales for three of eight goods categories. These categories were: Wholesale & Repair of Household Goods; Hardware, Building Supplies, Electrical Goods & Machinery; and Other Wholesale & Retail

TABLE 5.4
CONTRIBUTION TO TOTAL GOODS AND SERVICES PRODUCTION, 2010–2014
(PER CENT)^a

	2010	2011 ^r	2012	2013 ^r	2014 ^p
GOODS PRODUCING INDUSTRY	23.0	23.8	23.6	23.6	23.5
Agriculture, Forestry & Fishing	5.8	6.3	6.5	6.4	6.4
Mining & Quarrying	2.0	2.3	2.1	2.2	2.2
Manufacture	8.2	8.2	8.2	8.1	8.0
of which: Food, Beverages & Tobacco	4.4	4.5	4.5	4.5	4.6
Other Manufacturing	3.8	3.7	3.7	3.6	3.4
Construction	7.0	7.0	6.7	6.9	6.9
SERVICES INDUSTRY	77.0	76.2	76.4	76.4	76.5
Electricity & Water Supply	3.2	3.2	3.1	3.1	3.0
Transport, Storage & Communication	10.8	10.5	10.6	10.6	10.7
Wholesale & Retail Trade; Repair and Installation of Machinery	17.3	17.2	17.0	17.0	17.0
Finance & Insurance Services	10.7	10.6	10.7	10.8	10.7
Real Estate, Renting & Business Activities	10.5	10.3	10.3	10.3	10.4
Producers of Government Services	12.7	12.7	12.7	12.7	12.6
Hotels and Restaurants	5.1	5.2	5.3	5.4	5.5
Other Services	6.6	6.5	6.6	6.6	6.7
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

p - preliminary

r - revised

Sale of Goods & Services in Specialized & Non-Specialized Stores.

Finance & Insurance Services

Real value added for the Finance & Insurance Services industry increased by 0.2 per cent. For 2014, the industry was the third largest and accounted for 11.2 per cent of GDP, the same share as in 2013. The expansion in real value added resulted from:

- Growth in Total Assets, in particular, foreign currency denominated assets at deposit-taking institutions
- An increase in fees and commission income
- A rise in the earnings of life and general insurance companies.

The industry also benefited from a decline in Non-Performing Loans as a share of Total Loans (down by 0.5 percentage point to 4.9 per cent). This reflected a decrease in ratios for Commercial Banks, Institutions licensed under the FIA Act and Building Societies.

Real Estate & Business Activities

The Real Estate & Business Activities industry recorded a 0.5 per cent increase in real value added. This out-turn

stemmed from improved performances of both the Real Estate and Business Activities components of the industry. Among the Business Activities that contributed to the increase in real value added were investigation and security activities; business process outsourcing; advertising; and the renting of machinery & equipment.

Producers of Government Services

The Producers of Government Services industry contracted for the third consecutive year. Real value added for the industry declined by 0.2 per cent. The industry was the second largest, accounting for 13.1 per cent of GDP, down 0.1 percentage point relative to 2013. The industry's contraction was consistent with the fiscal consolidation element of the GoJ's Growth Strategy and aimed to reduce the public debt to no more than 60.0 per cent of GDP by FY2025/26. The average number of paid government employees was 145 950, a decline of 750 persons.

Hotels & Restaurants

For the Hotels & Restaurants industry, within which most of tourism activities are captured, real value added grew by 2.9 per cent. This was the largest change for any industry. The industry accounted for 5.7 per cent of GDP and contributed 0.2 percentage point to overall growth. Increased

TABLE 5.5
VALUE ADDED BY INDUSTRY AT CURRENT PRICES, 2010–2014

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p
GOODS PRODUCING INDUSTRY	236 653.9	261 546.7	276 763.6	303 119.5	324 379.5
Agriculture, Forestry & Fishing	62 436.7	70 860.8	76 447.6	86 258.3	90 652.7
Mining & Quarrying	12 720.5	15 486.8	14 811.6	15 524.7	17 796.8
Manufacture	88 964.7	97 278.3	105 174.0	113 349.2	119 696.1
of which: Food, Beverages & Tobacco	49 194.5	54 930.3	60 028.7	65 485.4	71 056.2
Other Manufacturing	39 770.1	42 348.0	45 145.3	47 863.8	48 639.9
Construction	72 532.1	77 920.8	80 330.4	87 987.3	96 233.9
SERVICES INDUSTRY	799 707.9	852 490.2	897 058.3	959 500.7	1 019 154.8
Electricity & Water Supply	33 390.0	36 288.1	36 496.0	40 048.7	44 057.6
Transport, Storage & Communication	100 782.4	104 136.6	101 213.8	105 550.5	111 835.1
Wholesale & Retail Trade; Repair and Installation of Machinery	186 511.2	201 490.7	213 059.0	233 935.4	252 999.9
Finance & Insurance Services	104 030.2	111 868.9	117 250.2	123 410.5	128 861.9
Real Estate, Renting & Business Activities	123 194.0	130 771.1	138 418.8	145 783.9	153 387.1
Producers of Government Services	142 580.9	152 651.3	167 393.2	176 445.8	180 323.3
Hotels and Restaurants	44 402.3	45 480.5	48 175.4	53 222.3	60 358.4
Other Services	64 817.0	69 803.2	75 052.0	81 103.7	87 334.5
Less Financial Intermediation Services Indirectly Measured (FISIM)	45 028.5	45 755.2	47 792.4	49 579.0	50 252.5
TOTAL GDP AT BASIC PRICES	991 333.3	1 068 281.7	1 126 029.6	1 213 041.2	1 293 281.8
TAXES LESS SUBSIDIES ON PRODUCTS	162 647.9	172 790.3	189 724.5	217 382.2	236 156.3
GDP AT MARKET PRICES ^a	1 153 981.2	1 241 072.1	1 315 754.1	1 430 423.4	1 529 438.1

a - Total GDP at Market Prices is the sum of Total GDP at Basic Prices and Taxes Less Subsidies on Products

p - preliminary

r - revised

value added stemmed from expansions in both segments of the industry and reflected in part improved economic outcomes of Jamaica's main trading partners. Within the Hotels component, stopover arrivals grew by 3.6 per cent to 2 080 181 persons. This was influenced by growth in arrivals from the United States of America, Canada and Europe. Cruise passenger arrivals also increased, up 12.5 per cent to 1 423 797. Total visitor expenditure amounted to US\$2 235.7 million, an increase of 5.8 per cent, reflecting growth in expenditure by both stopover visitors and cruise passengers. Within the Restaurants segment of the industry, there were increased activities in restaurants, bars and canteens.

Other Services

Real value added for the Other Services industry was 1.2 per cent higher. This improved performance resulted from increased output from:

- Betting Activities – associated in part with the introduction of new products and additional daily draws
- Radio & Television Broadcast – associated with the broadcasting of the 2014 Football World Cup tournament and Commonwealth Games
- Tourism-related activities – associated with increased tourist arrivals.

GDP at Current Prices⁴

GDP at market prices (nominal GDP) totalled \$1 529 438.1 million. Of this amount, the Services Industry generated \$1 019 154.8 million, while the Goods Producing Industry accounted for \$324 379.5 million (Table 5.5). The out-turn in total GDP represented a nominal increase of 6.9 per cent. During the year, Taxes less Subsidies on Products was 15.4 per cent of total GDP at market prices relative to 15.2 per cent in 2013. GDP per capita was US\$5 050.12 relative to US\$5 222.76 in 2013.

OUTLOOK

It is anticipated that for 2015, real GDP will increase. This increase is dependent on positive developments in both the international and domestic environments. With respect to the global economy, growth of 3.5 per cent is projected. Jamaica's main trading partners, the United States of America and Canada, are projected to grow by 3.6 per cent and 2.3 per cent, respectively, which augurs well for the demand for Jamaican goods and services.

Within the domestic environment, a sound macro-economic framework, ongoing structural reforms and the implementation of strategic investment projects is expected

to provide the predictability, increased competitiveness and catalytic investments needed for sustained economic growth. Specifically, these investments should increase domestic demand; strengthen investor confidence; and improve linkages within the economy, due in part to the depreciation of the Jamaica dollar.

Consequently, real value added for both the Goods Producing and Services Industries are expected to increase. Within the Goods Producing Industry, growth is predicated mainly on:

- Agriculture, Forestry & Fishing – increased output to be underpinned by the Agro Park initiative which aims to stabilise the agricultural supply chain, deepen inter-industry linkages, increase competitive import substitution and activate unutilised rural land and labour. The industry is also expected to benefit from the strategies of the Tourism-Agriculture Linkages Technical working group, which was formed to enhance linkages between the two sectors.
- Mining & Quarrying – resulting from an anticipated increase in global demand for bauxite and alumina.
- Construction – due to increased civil engineering activities associated with the continued construction of the North South leg of Highway 2000.

For the Services Industry, all industries, with the exception of Producers of Government Services, are projected to record increased output. The Hotels & Restaurants industry is expected to record the highest absolute increase in real value added. This is predicated on continued improvement in the economies of Jamaica's main tourism markets; continued public and private marketing efforts; and increased room stock. Growth in the Transport, Storage & Communication industry should stem from increased transport-related activities associated in part with an expansion in bauxite and alumina exports. In addition, the telecommunications sub-industry is expected to benefit from continued competition between service providers.

Downside risks, to the projected growth out-turn for the economy, include the following:

- Weather-related shocks and the adverse impact those would have on output and fiscal expenditure
- Delays in the implementation of the GoJ's policy initiatives
- Lower than expected growth of the global economy which may weaken the demand for Jamaican goods and services. ■

4. GDP at current prices is current production valued at current prices. Therefore, a change in GDP at current prices reflects both changes in quantity and the price of production.

BALANCE OF PAYMENTS & EXTERNAL TRADE

INTRODUCTION

World economic output for 2014 was estimated to have grown by 3.3 per cent¹. The out-turn reflected improved performances for Advanced and Emerging Market & Developing Economies. The higher global output was supported and facilitated by a 3.1 per cent increase in the volume of goods and services traded.

Within the domestic economy, real value added growth of 0.4 per cent was recorded for 2014, reflecting a decline of 0.1 per cent in the Goods Producing Industry (owing largely to the dampening effect of drought conditions on Agriculture and other related industries); and an increase of 0.5 per cent in the Services Industry. Growth occurred against the background of continued efforts by the Government of Jamaica (GoJ) to meet the quantitative targets outlined in the Extended Fund Facility (EFF) arrangement with the International Monetary Fund. An improved external trade position was reflected in a narrowing of the trade deficit and a reduction in the country's net borrowing balance relative to 2013.

The foreign exchange market demonstrated greater stability in 2014. The Jamaican dollar vis-à-vis the United States dollar recorded a nominal depreciation of 7.2 per cent, a slower pace of depreciation relative to 2013. The slowing in the depreciation reflected, in part, the continued impact of the country's positive performance under the EFF.

POLICY & PROGRAMMES

Trade Agreements/Policies

*CARIFORUM-European Union (EU) Economic Partnership Agreement (EPA)*²

The 1st meeting of the CARIFORUM-EU Consultative Committee³ was held in Brussels in November. The Consultative Committee comprises regional non-State actors from both

CARIFORUM and the EU and suggested a number of prerequisites which were deemed necessary for CARIFORUM States to harness the benefits of the EPA. The prerequisites included greater focus on implementing areas yet to be fully developed such as services and intellectual property rights; disbursement of funds to support projects in EPA implementation; capacity building in areas such as Technical Barriers to Trade (TBT), Sanitary and Phytosanitary Standards (SPS) & market penetration; and support for diversification of the non-traditional commodities sectors.

The 4th meeting of the Trade and Development Committee held in November in Brussels conducted its first five-year appraisal of the EPA and reviewed a progress report on the implementation of the EPA by participating Member States. The discussions were guided by the results of the study entitled 'Monitoring the Implementation and Results of the CARIFORUM-EU Economic Partnership Agreement (EPA)'. Two of the main outcomes of the meeting were an agreement to create subsidiary bodies to implement a number of provisions of the EPA and the establishment of a Task Force comprising officials from the CARIFORUM Directorate and the EU Commission. The Task Force is to make proposals on the key issues identified by the Five Year Review, which are to be addressed by the Joint CARIFORUM EU Council.

Status of Implementation of the EPA at the National Level

Jamaica has not yet ratified the EPA, however, the Agreement is being provisionally applied. A regional implementation matrix, which is being revised, was developed by the Implementation Unit of the CARIFORUM Directorate and has served as a reference for EPA implementation at the national level. Jamaica has taken actions such as participating in meetings of the institutions as well as collaborating with the Delegation of the EU to develop and implement projects

1. World Economic Outlook Update – January 2015

2. The CARIFORUM-EU EPA was signed by fourteen CARICOM Member States and the Dominican Republic and 27 European Union Member States in October 2008. Under the EPA, trade in some goods, services and investment in CARIFORUM will be liberalized on a phased basis, with the exception of sensitive products which consist mainly of agricultural products. CARIFORUM States received immediate duty-free/ quota-free market access for all goods into the EU except for rice and sugar.

3. The Consultative Committee is designed to promote dialogue with representatives of civil society and other social partners

focused on capacity building and increasing competitiveness among exporters.

CARICOM/CSME

The 2nd round of Bilateral Consultations on Free Movement in the CARICOM Single Market and Economy (CSME) between the Republic of Trinidad and Tobago and Jamaica was held in Port of Spain in June to discuss matters related to trade in goods and services. Both delegations assessed the progress made since the initial Round of Consultations and agreed to urgently explore follow-up measures. A recommitment was made to enhance the process for collecting and sharing more specific data in respect of travel between the countries, and to develop public education programmes highlighting the rights and responsibilities of nationals exercising their right to travel freely in the Single Market.

CARICOM Bilateral Agreements

The 38th Meeting of the Council for Trade and Economic Development (COTED) approved the findings and recommendations of a study, *Assessment of the Performance of CARICOM Extra-regional Trade Agreements*. The study was commissioned by the CARICOM Secretariat to examine CARICOM's performance under bilateral trade agreements signed with Costa Rica, Cuba, the Dominican Republic, Venezuela and Colombia. The study, undertaken by the Economic Commission for Latin America and the Caribbean (ECLAC), found that there was a general underperformance of CARICOM's formal trade arrangements, evidenced by the deterioration in the trade balance with most of the Western Hemispheric countries with which it has bilateral trade agreements during the past decade. Of the countries or groups of countries with which the Region has formal trading arrangements, CARICOM generated trade surpluses with only Cuba in 2013. The study also determined that extra-regional trade agreements with Costa Rica, Colombia and the Dominican Republic do not impact significantly on exports of CARICOM countries. Further, with the exception of the European Union and Venezuela, the utilization rates of all of the sub-region's existing bilateral Free Trade Agreements have contracted or remained fairly steady over the period 2007–2012, suggesting that CARICOM countries may have been unable to transform their production systems to take advantage of the market access opportunities provided by these trade arrangements. This recognition informed a recommendation that the sub-region's industrial policy should inform its trade policy.

Jamaica obtained Parliamentary approval for the ratification of the CARICOM-Cuba, CARICOM-Costa Rica and

CARICOM-Dominican Republic Trade Agreements, which will take effect once the decision has been gazetted.

CANADA/CARICOM–Negotiation of the Trade and Development Agreement⁴

The negotiations for a Trade and Development Agreement between CARICOM and Canada, which began in 2009, continued in 2014, with Jamaica maintaining active participation. Three Rounds of negotiations were held during the year: the 5th Round in January; the 6th Round, which was held in two parts in March and April, respectively; and the 7th Round in June. Both CARICOM and Canada have been seeking to arrive at a framework agreement on all outstanding issues in the negotiations.

USA/CARICOM Trade

Jamaica participated in the 6th meeting of the CARICOM–USA Trade and Investment Council (TIC), which took place in October in Nassau, The Bahamas. The revised Trade and Investment Framework Agreement (TIFA), which was signed in March 2013, provides the mechanism through which CARICOM and the USA will discuss issues of mutual interest in the areas of trade and economic cooperation in the Trade and Investment Council (TIC).

The 6th meeting of the TIC addressed bilateral issues of importance including the United States' Caribbean Energy Security Initiative; the development of a capacity-building programme in the Region to reach common solutions to address Intellectual Property Rights violations; and the Region's request for technical assistance for Sanitary and Phytosanitary (SPS) measures in agricultural products to ensure compliance with the Food Safety Modernization Act (FSMA) 2011. The Act requires Jamaican and other exporters to meet higher food safety standards in the US market.

Geographical Indications Agreement (GIs Agreement)

Jamaica's Bilateral Agreement on the Mutual Recognition and Protection of Geographical Indications with Switzerland entered into force on September 1, 2014. This bilateral GIs Agreement will protect the intellectual property rights of Jamaican products and services in Switzerland.

Commodity Agreements/Organizations

The 45th Annual International Sugar Organization (ISO) Council meeting took place in May in Jamaica, under the theme, 'Positioning for the New Market Frontiers'. A primary point of discussion was developments related to export markets for sugar post-2017. While sugar exported by Jamaica will still have duty-free and quota-free access to Europe after 2017, there will be no price guarantee, as the EU will also

4. The CANADA/CARICOM trade agreement is intended to be a modern trade agreement that will take into account differing levels of development, vulnerabilities associated with island states, and trade-related capacity challenges. The Trade Agreement is to replace the non-reciprocal CARIB-CAN, the WTO waiver which allowed Canada to grant non-reciprocal preferences, and which expired on December 31, 2014; as well as the 1998 CARICOM-Canada Protocol on Rum.

be offering other sugar producing countries duty-free and quota-free access under various bilateral and regional trade agreements. Other topics discussed included the competitive challenges being posed by alternative sweeteners, the current low global price for sugar, opportunities for improved productivity within the sector, and the increased market demand for sugar from East Asia and Africa.

The 5th Meeting of CARICOM Sugar Stakeholders was held in May, on the margins of the 45th Council Session of the ISO. The meeting addressed the current state of, and development plans for the sugar industry in the region; developments and issues in the European Union relating to sugar; issues related to the United States' market; and the tariffs applied to raw and refined extra-regional sugar.

World Trade Organization (WTO)

Following the successful conclusion of the Ninth Session of the WTO Ministerial Conference held in December 2013 in Bali, Indonesia, work focused throughout 2014 on the implementation of the Bali Ministerial Decisions emanating from the Conference, in the areas of Trade Facilitation (TF), agriculture and development. The Bali Package is a selection of issues from the broader Doha Round of negotiations designed to streamline trade, allow developing countries more options for providing food security, boost least developed countries' trade and aid development in a general way. With regards to TF, Jamaica convened its WTO Trade Facilitation Needs Assessment Exercise in Kingston in May. The assessment will assist Jamaica to implement the TF Agreement, including the identification of the nature and extent of technical and financial assistance and capacity building that will be needed to implement the Agreement.

African, Caribbean & Pacific (ACP)-EU ISSUES

Banana Accompanying Measures (BAM)

Jamaica is one of 10 ACP countries that benefit from the provisions of the BAM. The overall aim of the Jamaica BAM is to combat poverty and improve revenue in the banana dependent areas. The first Programme Estimate and grant contract from the Banana Board was completed during the year. As at 31st December 2014, a total of €1 453 339.5, or approximately 30.7 per cent of the programmed resources, had been expended. Anticipated targets for Fiscal Year 2014–15 included: the establishment of operational procedures such as Credit Schemes for the All Island Banana Growers Association (AIBGA); procurement of supplies for AIBGA

farm stores; and the strengthening/conversion of district branches of the AIBGA into production clusters/farmers cooperatives. In addition, the project is expected to contract technical experts in marketing and capacity building to help strengthen the AIBGA; develop an operational manual for the production clusters; improve the infrastructure of the farm stores and other facilities; relocate oil tanks; procure equipment and containers; and construct a value-added facility.

Caribbean Regional Indicative Programme (CRIP)

Status of the 10th European Development Fund (EDF) Programming and Implementation

Financing agreements were signed in 2014 for the following outstanding Programmes: CARIFORUM Crime and Security Cooperation; Support to Facilitate Participation of CARIFORUM Civil Society in the Regional Development and Integration Process; and Support for Wider Caribbean Cooperation. The CARIFORUM Directorate is expected to continue to monitor the status of implementation of the projects under the 10th EDF CRIP.

11th EDF National Indicative Programme (NIP)

On September 2, 2014, the Agreement for Jamaica's National Indicative Programme (NIP) under the 11th EDF was co-signed by Jamaica and the EU. The signing took place in the margins of the Third International Conference on Small Island Developing States (SIDS) in Samoa. Jamaica was among 20 countries within the ACP Group of States, including 10 Caribbean countries⁵, which signed onto a package of €339.0 million in bilateral assistance for the period 2014–2020. To date, 53 NIPs have been finalised and those remaining are expected to be signed by the end of the first quarter of 2015. Jamaica's NIP for 2014–2020 was subsequently launched on November 7, 2014, with the country expected to receive €46 million, which has been prioritised for projects in the areas of the rule of law, the environment and climate change.

PERFORMANCE

BALANCE OF PAYMENTS⁶

For the calendar year, Jamaica recorded net borrowing of US\$1 150.5 million compared with net borrowing of US\$1 300.7 million in 2013, which reflected mainly a narrowing of the Current Account Deficit (Table 6.1). The Current Account deficit amounted to US\$1 159.7 million, an improvement of US\$159.9 million compared with 2013, and

5. Other Caribbean countries included: Antigua & Barbuda, Barbados, Dominica, Grenada, Guyana, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines and Trinidad & Tobago.

6. The Quarterly Balance of Payments Report prepared by the Bank of Jamaica, from which the PIOJ obtains its BOP data is now being produced using the methodology outlined in the Balance of Payments Manual (BPM) 6. One major change in the methodology is that the Capital Account is now grouped with the Current Account. The overall balance from the Current and the Capital Account is now referred to as Net Lending or Borrowing. The use of debits and credits for the Financial Account has been replaced by Net Acquisition of Financial Assets and the Net Incurrence of Liabilities. BPM6 also introduces the categories of Primary and Secondary Income, which is consistent with the System of National Accounts (SNA). Primary Income encompasses returns that accrue to institutional units for their contribution to the production process or for the provision of financial assets and renting of natural resources. Secondary Income represents Current Transfers between residents and non-residents.

the 3rd consecutive annual improvement since 2011 (Figure 6A). The Current Account deficit to GDP ratio also registered improvement, moving to 8.3 per cent from 9.3 per cent in 2013. The lower deficit stemmed from improvements of US\$198.1 million and US\$71.2 million, respectively in the Goods & Services and Secondary Income sub-accounts. However, a worsening of US\$109.4 million in the deficit on the Primary Income sub-account partially outweighed these improvements.

The deficit on the Goods & Services sub-account was US\$3 065.1 million compared with US\$3 263.2 million in 2013. The improvement in the deficit emanated from the combined effect of a US\$166.2 million reduction in aggregate import expenditure and a US\$31.9 million increase in combined export earnings.

There was a narrowing of US\$150.9 million to US\$3 730.5 million in the deficit on the Goods sub-account. This was due mainly to lower spending of US\$278.4 million on imports. This reflected reduced expenditure on mineral fuels (down US\$240.4 million) and chemicals (down US\$131.8 million) imports. However, the lower expenditure on imports was partially offset by a reduction of US\$127.5 million to US\$1 453.0 million in export receipts. The fall-off was due to

decreased earnings of US\$85.2 million and US\$42.1 million from chemicals and mineral fuels exports, respectively.

The balance of the Services sub-account was US\$665.4 million, an improvement of US\$47.1 million compared with 2013. This out-turn was due to improvements in travel (up US\$164.6 million) and transportation services (up US\$18.5 million). Declines were however recorded for insurance and pension (down US\$45.9 million), other business (down US\$41.7 million) and construction services (down US\$36.3 million).

The deficit on the Primary Income (formerly Income) sub-account deteriorated by US\$109.4 million to US\$386.3 million relative to 2013. The worsening of the deficit was primarily ascribed to higher interest income outflows and increased repatriation of profits by companies engaged in Foreign Direct Investment.

The Secondary Income (formerly Current Transfers) sub-account recorded a surplus of US\$2 291.8 million relative to a surplus of US\$2 220.5 million in 2013. The expansion in the surplus was due primarily to an increase of US\$102.1 million in personal (private) transfers.

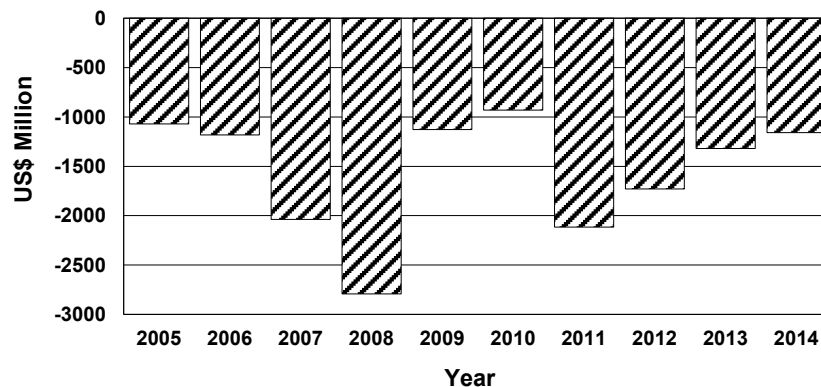


FIGURE 6A: CURRENT ACCOUNT DEFICIT, 2005–2014

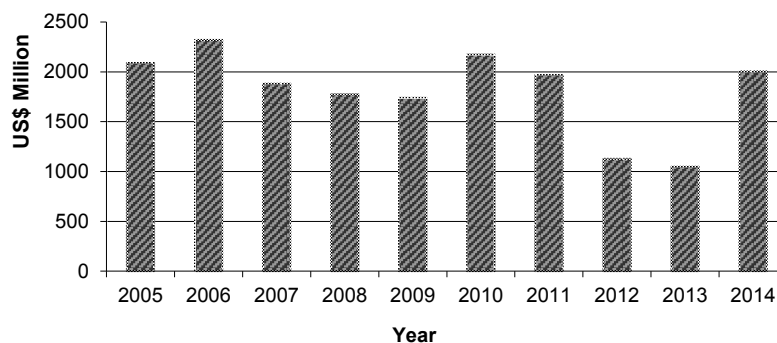


FIGURE 6B: STOCK OF NET INTERNATIONAL RESERVES, 2005–2014

The surplus on the Capital Account was US\$9.2 million compared with a surplus of US\$18.9 million in 2013. The lower out-turn was due to a fall-off in Capital Transfers (down US\$9.7 million) which was impacted by a decline in Official Transfers. Combined, the balances on the Capital and Current Accounts resulted in net borrowing of US\$1 150.5 million relative to US\$1 300.7 million in 2013.

The Financial Account recorded net borrowing of US\$1 186.9 million to finance the current account deficit, using Direct Investment of US\$701.4 million, Portfolio Investment of US\$439.4 million and Other Investments of

US\$524.3 million. For 2013, Jamaica recorded net borrowing of US\$1 185.0 million. Consequently, flows from Official and Private sources were sufficient to finance the net borrowing balance on the Current and Capital accounts. This resulted in an increase of US\$656.3 million in Reserve Assets for 2014.

At the end of December, the NIR was US\$2 001.09 million, compared with US\$1 047.83 million at the end of December 2013 (Figure 6B). Gross International Reserves (GIR) at the end of December 2014 amounted to US\$2 473.01 million, the equivalent of 18.41 weeks of goods and services imports⁷. This compares with GIR of US\$1 817.56 million at

TABLE 6.1
BALANCE OF PAYMENTS ACCOUNTS 2013, 2014
US\$ MILLION

BPM6 Methodology	2013	2014	2014/2013
			Absolute Change
Current Account Balance	-1 319.6	-1 159.7	159.9
Credits	7 107.2	7 152.2	45.0
Debits	8 426.8	8 311.9	-115.0
Goods & Services	-3 263.2	-3 065.1	198.1
Exports	4 246.0	4 278.7	31.9
Imports	7 510.0	7 343.9	-166.2
Goods	-3 881.5	-3 730.5	150.9
Exports	1 580.5	1 453.0	-127.5
Imports	5 462.0	5 183.6	-278.4
Services	618.3	665.4	47.1
Exports	2 666.3	2 825.7	159.4
Imports	2 048.1	2 160.3	112.2
Primary Income	-276.9	-386.3	-109.4
Credits	396.7	345.7	-51.0
Debits	673.6	731.9	58.3
Secondary Income	2 220.5	2 291.8	71.2
Credits	2 463.7	2 527.8	64.1
Debits	243.2	236.1	-7.1
Capital Account	18.9	9.2	-9.7
Credits	18.9	9.2	-9.7
Debits	0.0	0.0	0.0
Net lending (+)/ net borrowing (-) (balance from current and capital account)	-1 300.7	-1 150.5	150.2
Financial Account			
Net lending (+) / net borrowing (-) (balance from financial account)	-1 185.0	-1 186.9	-1.9
Direct Investment	-740.8	-701.4	39.4
Net acquisition of financial assets	-86.9	-2.1	84.8
Net incurrence of liabilities	653.9	699.3	45.4
Portfolio Investments	-74.5	-439.4	-364.9
Net acquisition of financial assets	137.6	328.1	190.5
Net incurrence of liabilities	212.1	767.4	555.3
Financial derivatives	66.5	-178.1	-244.6
Net acquisition of financial assets	-21.4	-221.0	-199.7
Net incurrence of liabilities	-87.8	-42.9	44.9
Other Investments	-272.6	-524.3	-251.7
Net acquisition of financial assets	218.0	-173.3	-391.3
Net incurrence of liabilities	490.6	351.0	-139.6
Reserve Assets	-163.6	656.3	819.9
Net Errors and Omissions	115.7	-36.4	-152.1

Source: Bank of Jamaica

7. The international benchmark for the reserves is funds equivalent to 12 weeks of goods and services imports.

the end of December 2013, the equivalent of 12.76 weeks of goods and services imports.

EXTERNAL TRADE

Merchandise Trade

Jamaica's trade deficit with the rest of the world was US\$4 386.2 million, an improvement of \$163.3 million relative to 2013 (Table 6.2). The narrowing of the deficit reflected mainly a decline of US\$291.6 million (down 4.8 per cent) to US\$5 838.2 million in spending on imports, which was partially

offset by an US\$128.4 million reduction (down 8.1 per cent) to US\$1 452.0 million in export receipts (Figure 6C).

Merchandise Exports

The fall-off in receipts from exports stemmed from declines in seven of the ten categories (Table 6.2) reflecting weak external demand. The primary contributors to the overall decline in exports were Chemicals; Food; Mineral Fuels, etcetera; and Beverages & Tobacco. Earnings from Chemicals declined by 75.2 per cent to US\$28.2 million due to the continued impact of lower ethanol⁸ exports. Exports

TABLE 6.2
MERCHANDISE TRADE BY SITC SECTION, 2013–2014
US\$ MILLION

	2013 ^f			2014 ^p			2014/2013			
	Imports	Exports	Balance	Imports	Exports	Balance	Absolute Change		Per Cent Change	
							Imports	Exports	Imports	Exports
Total Merchandise Trade	6 129.9	1 580.4	-4 549.5	5 838.2	1 452.0	-4 386.2	-291.6	-128.4	-4.8	-8.1
Of which Jamaica Free Zone	276.2	101.2	-175.0	124.5	13.3	-111.2	-151.7	-87.9	-54.9	-86.9
Food	963.6	243.2	-720.4	919.9	240.3	-679.6	-43.6	-2.9	-4.5	-1.2
Beverages and Tobacco	77.1	83.3	6.2	72.7	80.2	7.5	-4.4	-3.1	-5.7	-3.7
Crude Materials (excluding Fuel)	56.0	685.6	629.6	64.0	700.3	636.3	8.0	14.7	14.2	2.1
Mineral Fuels, etcetera	2 176.7	351.3	-1 825.4	1 936.3	307.4	-1 628.9	-240.4	-43.9	-11.0	-12.5
Animal & Vegetable Oils and Fats	42.8	0.4	-42.4	38.9	0.4	-38.5	-4.0	0.0	-9.2	1.8
Chemicals	749.1	113.4	-635.7	617.2	28.2	-589.1	-131.8	-85.2	-17.6	-75.2
Manufactured Goods	600.6	33.2	-567.4	614.3	50.5	-563.7	13.7	17.4	2.3	52.3
Machinery and Transport Equipment	905.7	38.9	-866.8	967.0	21.8	-945.2	61.3	-17.1	6.8	-43.9
Misc. Manufactured Articles	444.0	24.2	-419.8	493.9	16.4	-477.5	49.9	-7.9	11.2	-32.5
Other	114.3	6.8	-107.5	114.0	6.5	-107.5	-0.3	-0.3	-0.2	-4.6

Discrepancies in Table due to rounding

Source: Statistical Institute of Jamaica



FIGURE 6C: GROWTH IN EXPORTS AND IMPORTS (%) 2005–2014

8. Producers of ethanol in Jamaica continued to be impacted primarily by increases in the price of raw materials from Brazil, the primary market for inputs. Other factors impacting the downturn in ethanol production included the price of hydrous alcohol, the price of corn and anhydrous alcohol in the USA, and the Brazilian real to United States dollar exchange rate.

of Mineral Fuels also declined, valuing US\$43.9 million less than in 2013. Beverages and Tobacco fell by US\$3.1 million and was due to declines in receipts from Alcoholic Beverages (excluding Rum) and Tobacco exports.

Lower receipts from the aforementioned categories were tempered by increased receipts from Manufactured Goods (up US\$17.4 million to US\$50.5 million), and Crude Materials excluding Fuel (up US\$14.7 million to US\$700.3 million). The higher receipts from exports of manufactured goods were due mainly to a 6.1 per cent increase in cement exports relative to 2013, while the higher value of Crude Materials was linked to higher exports of Bauxite, Alumina, and Waste & Scrap Metals.

Traditional Domestic Exports

Traditional Domestic Exports rose by US\$2.8 million compared with 2013. The higher earnings stemmed from increased receipts of US\$8.9 million from Mining & Quarrying. Agriculture and Manufacture recorded lower receipts of US\$5.1 million and US\$1.1 million, respectively (Table 6.3).

Higher earnings from Bauxite (up US\$3.2 million to US\$131.2 million) and Alumina (up US\$5.7 million to US\$529.4 million) accounted for the overall growth in Mining & Quarrying earnings. The volume of Bauxite exported grew by 106.1 thousand tonnes to 4 812.5 thousand tonnes in response to increased global consumption of aluminium. However, the higher Alumina receipts reflected a 9.6 per cent increase in the average price of the commodity, as the volume of alumina exported declined by 4.1 per cent relative to 2013. There were no exports of Gypsum in 2014.

The fall-off in Agriculture earnings reflected declines in three categories: Coffee (down US\$2.8 million); Citrus (down US\$1.6 million); and Pimento (down US\$1.3 million) due to the following factors:

- Coffee exports were curtailed due to the lowest production of coffee since the 1988/89 crop year, stemming from the adverse impact of the Coffee Leaf Rust Disease, a sustained reduction in demand, and lower market prices
- Citrus continued to be affected by the Citrus Greening Disease which lowered production by 15.0 per cent
- Pimento production was affected by drought conditions which prevailed during the year
- Higher receipts from Cocoa (up US\$0.5 million) and Banana (up US\$0.1 million) tempered the downturn in the categories which recorded lower earnings. The production of these commodities demonstrated recovery from the impact of Hurricane Sandy driven by rehabilitation and replanting efforts.

The lower receipts from Manufacture were due primarily to reduced earnings from Rum (down US\$3.5 million to US\$44.7 million), reflecting an 18.3 per cent decline in Rum & Alcohol production. Declines in earnings were also recorded for Coffee Products (down US\$0.3 million) and Citrus Products (down US\$0.1 million). These declines were moderated by higher receipts from Sugar (up US\$2.6 million) which registered an increase of 13.9 thousand tonnes to 75.5 thousand tonnes; and Cocoa Products (up US\$0.2 million).

Non-Traditional Domestic Exports

Non-Traditional Domestic Exports declined by US\$113.5 million to US\$606.1 million relative to 2013. This out-turn stemmed from lower receipts of US\$119.0 million and US\$0.4 million in the categories Other and Food, respectively. These declines outweighed the US\$5.7 million increase in earnings from Crude Materials exports.

Within the category Other, the fall-off in Chemicals (including Ethanol) was the main contributor to the out-turn. This was attributed to the protracted decline in earnings from Ethanol exports. The decline in Other was compounded by reduced receipts from five additional categories including Mineral Fuels, et cetera (down US\$43.9 million) reflecting a drop in the value of Bunker C and TurboJet A1 fuel; Other Domestic Exports (down US\$0.9 million); and Machinery & Transport Equipment (down US\$0.7 million). Increased earnings from Manufactured Goods (up US\$11.8 million) and Wearing Apparel partially mitigated the declines.

The value of 10 of the 17 categories of Food exports declined relative to 2013. Of the 10 categories, the highest absolute declines were for Ackee (down US\$3.5 million); Sweet Potatoes (down US\$0.9 million); Malt Extract & Preparations thereof (down US\$0.8 million) and Animal Feed (down US\$0.8 million). These declines were counterbalanced by increases in the remaining categories, of which growth in the value of Fish, Crustaceans & Molluscs (up US\$1.6 million); Other Food Exports (up US\$1.4 million); and Baked Products (up US\$1.2 million) accounted for the largest absolute increases.

Growth in Crude Materials reflected higher receipts from Limestone (up US\$0.4 million) and Waste & Scrap Metal (up US\$7.2 million). Further growth in the category was stymied by a decline in the category Other which fell by US\$1.8 million to US\$2.7 million.

The higher Beverages & Tobacco receipts emanated from growth in Alcoholic Beverages (excluding Rum) {up US\$3.1 million}, notwithstanding the remaining categories of Non-Alcoholic Beverages (down US\$2.9 million) and Tobacco registered declines.

Merchandise Imports

The lower expenditure on imports largely reflected reduced spending on Mineral Fuels, etcetera—the primary import category—which fell by US\$240.4 million relative to

TABLE 6.3
TRADITIONAL & NON-TRADITIONAL DOMESTIC EXPORTS, 2013–2014
US\$ '000

	2013 ^r	2014 ^p	Absolute Change	2014/2013 Per Cent Change
TOTAL TRADITIONAL EXPORTS	779 567.0	782 323.0	2 756.0	0.4
Agriculture	22 126.0	16 997.0	-5 129.0	-23.2
Banana	62.0	179.0	117.0	189.1
Citrus	3 322.0	1 732.0	-1 590.0	-47.9
Coffee	16 327.0	13 479.0	-2 848.0	-17.4
Cocoa	504.0	1 028.0	524.0	103.9
Pimento	1 912.0	579.0	-1 333.0	-69.7
Mining and Quarrying	651 721.0	660 666.0	8 945.0	1.4
Bauxite	127 994.0	131 219.0	3 225.0	2.5
Alumina	523 727.0	529 447.0	5 720.0	1.1
Gypsum	0.0	0.0	n/a	n/a
Manufacture	105 720.0	104 659.0	-1 061.0	-1.0
Sugar	53 158.0	55 784.0	2 626.0	4.9
Rum	48 178.0	44 725.0	-3 453.0	-7.2
Citrus Products	350.0	247.0	-103.0	-29.4
Coffee Products	3 175.0	2 829.0	-346.0	-10.9
Cocoa Products	860.0	1 073.0	213.0	24.8
TOTAL NON TRADITIONAL EXPORTS	719 628.0	606 086.0	-113 542.0	-15.8
Food:	152 720.0	152 366.0	-354.0	-0.2
Pumpkins	708.0	462.0	-246.0	-34.8
Other Vegetables & Preparations thereof	2 666.0	2 623.0	-43.0	-1.6
Dasheen	1 563.0	1 381.0	-182.0	-11.6
Sweet Potatoes	3 565.0	2 626.0	-939.0	-26.3
Yams	22 221.0	21 961.0	-260.0	-1.2
Papayas	3 365.0	3 897.0	532.0	15.8
Ackee	15 543.0	12 066.0	-3 477.0	-22.4
Other Fruits & Fruit Preparations	5 682.0	5 667.0	-15.0	-0.3
Meat & Meat Preparations	4 964.0	5 084.0	120.0	2.4
Dairy Products & Bird's Eggs	6 237.0	6 895.0	658.0	10.6
Fish, Crustaceans & Molluscs	10 998.0	12 587.0	1 589.0	14.4
Baked Products	12 396.0	13 634.0	1 238.0	10.0
Juices excluding Citrus	7 252.0	7 180.0	-72.0	-1.0
Animal Feed	11 675.0	10 873.0	-802.0	-6.9
Sauces	15 042.0	16 028.0	986.0	6.6
Malt Extract & Preparations thereof	4 521.0	3 699.0	-822.0	-18.2
Other Food Exports	24 322.0	25 701.0	1 379.0	5.7
Beverages & Tobacco (excl. Rum):	34 984.0	35 115.0	131.0	0.4
Non-Alcoholic Beverages	11 536.0	8 599.0	-2 937.0	-25.5
Alcoholic Beverages (excl. Rum)	23 429.0	26 509.0	3 080.0	13.1
Tobacco	19.0	7.0	-12.0	-60.6
Crude Materials:	33 684.0	39 396.0	5 712.0	17.0
Limestone	2 532.0	2 884.0	352.0	13.9
Waste and Scrap Metal	26 683.0	33 835.0	7 152.0	26.8
Other	4 469.0	2 677.0	-1 792.0	-40.1
Other:	498 240.0	379 209.0	-119 031.0	-23.9
Mineral Fuels, etc.	351 223.0	307 349.0	-43 874.0	-12.5
Animal & Vegetable Oils & Fats	373.0	336.0	-37.0	-9.9
Chemicals (incl. Ethanol)	108 324.0	23 037.0	-85 287.0	-78.7
Manufactured Goods	24 413.0	36 205.0	11 792.0	48.3
Machinery and Transport Equipment	3 198.0	2 449.0	-749.0	-23.4
Wearing Apparel	1 363.0	1 373.0	10.0	0.7
Furniture	545.0	542.0	-3.0	-0.6
Other Domestic Exports	8 802.0	7 918.0	-884.0	-10.0

p - preliminary

r - revised

Discrepancies in table due to rounding

Source: Statistical Institute of Jamaica

2013 due to lower imports of petroleum, petroleum products and related materials. The lower spending on imports partly reflected a decline in the West Texas Intermediate crude oil price, to which Jamaica's energy prices are linked. Other categories for which lower spending was recorded included Chemicals (down US\$131.8 million) emanating from fewer imports of Ethanol products; Food (down US\$43.6 million); and Beverages & Tobacco (down US\$4.4 million).

Higher expenditure was recorded for four import categories. These were:

- Machinery & Transport Equipment which increased by US\$61.3 million owing partly to higher expenditure on telecommunication, sound recording & reproducing apparatus, and office machines & automatic data processing equipment
- Miscellaneous Manufactured Articles which grew by US\$49.9 million due to higher imports of items such as furniture & parts thereof, prefabricated buildings, sanitary plumbing, heating and lighting fixtures
- Manufactured Goods which recorded higher earnings of US\$13.7 million due to increased imports of non-metallic mineral manufactures; and paper, paperboard and articles of paper

- Crude Materials which were higher by US\$8.0 million reflecting higher imports of textile fibres, and cork and wood.

Imports by End-Use Classification

Imports classified by end-use fell by 4.8 per cent to US\$5 838.2 million relative to 2013. This reflected the impact of lower expenditure on items classified as Raw Materials/ Intermediate Goods (down US\$391.5 million to US\$3 429.0 million) and Passenger Motor Cars (down US\$41.0 million to US\$173.4 million). However, there was higher expenditure of US\$76.3 million and US\$64.7 million on Consumer Goods (excluding Motor Cars) and Capital Goods (excluding Motor Cars), respectively (Table 6.4).

Lower spending on Crude Oil (down US\$241.7 million) reflecting mainly lower prices; Industrial Supplies (down US\$98.8 million) reflecting lower imports of ethanol-related products; and Food (including Beverages) {down US\$67.3 million} owing to less imports of cereal and cereal preparations, contributed to the reduction in Raw Materials/ Intermediate Goods. These contractions were partly offset by higher expenditure on Parts & Accessories of Capital Goods (up US\$15.5 million) and Other Fuels and Lubricants (up US\$0.8 million).

The increased spending on imports classified as Consumer Goods (excluding Motor Cars) reflected increases in three

TABLE 6.4
IMPORTS BY END USE CLASSIFICATION, 2013–2014
US\$ MILLION

	2013 ^r	2014 ^p	2014/2013	
			Absolute Change	Per Cent Change
TOTAL IMPORTS (incl. Single Entity Free Zone)	6 129.9	5 838.2	-291.6	-4.8
Of which Jamaica Free Zone	276.2	124.5	-151.7	-54.9
Consumer Goods (excl. Motor Cars)	1 590.9	1 667.1	76.3	4.8
Food (incl. Beverages)	659.7	659.2	-0.6	-0.1
Non-Durable Goods	460.9	492.4	31.5	6.8
Semi-Durable Goods	153.0	168.6	15.6	10.2
Other Durable Goods (excl. Motor Cars)	317.3	347.0	29.7	9.4
Raw Material/Intermediate Goods	3 820.5	3 429.0	-391.5	-10.2
Food (incl. Beverages)	353.0	285.7	-67.3	-19.1
Industrial Supplies	1 017.4	918.6	-98.8	-9.7
Crude Oil	892.2	650.5	-241.7	-27.1
Other Fuels and Lubricants	1 283.8	1 284.6	0.8	0.1
Parts & Access. of Capital Goods	274.1	289.6	15.5	5.7
Capital Goods (excl. Motor Cars)	504.1	568.7	64.7	12.8
Other Indus. Transport Equipment	74.0	95.3	21.4	28.9
Construction Materials	157.9	172.4	14.5	9.2
Machinery and Equipment	264.8	292.4	27.6	10.4
Other Capital Goods	7.3	8.6	1.2	16.9
Passenger Motor Cars^a	214.4	173.4	-41.0	-19.1

a - This includes cars imported to be used as Consumer Goods or Capital Goods

r - revised data

p - preliminary data

categories which outweighed the decline in spending for Food (including Beverages) {down US\$0.6 million}. The higher spending was recorded for Non-Durable Goods (up US\$31.5 million); Other Durable Goods (excluding Motor Cars) {up US\$29.7 million} and Semi-Durable Goods (up \$15.6 million).

Higher spending was recorded for all categories within Capital Goods (excluding Motor Cars). These were Machinery & Equipment (up US\$27.6 million) reflecting higher imports of telecommunication equipment and specialized machinery; Other Industrial Equipment (up US\$21.4 million) due to increased importation of buses for the Transport sub-industry; Construction Materials (up US\$14.5 million); and Other Capital Goods (up US\$1.2 million).

CARICOM Trade

Jamaica's trade deficit with CARICOM was US\$674.6 million, an improvement of US\$172.6 million compared with 2013. The narrowing of the deficit emanated from the combined effect of a decline of US\$162.5 million in import expenditure and a US\$10.1 million increase in export receipts (Table 6.5).

The decline in expenditure on imports was primarily attributable to a US\$142.1 million decline in spending on Mineral Fuels from the region, reflecting lower imports of petroleum, petroleum products and other related materials. Declines were also recorded for four other categories, of which lower expenditure on Food (down US\$15.6 million)

accounted for the highest absolute decline, owing to lower imports of vegetables and fruit; sugar and sugar preparations; and miscellaneous edible products and preparations. Increased expenditure on the remaining categories mitigated a further decline in spending, with higher expenditure on Chemicals (up US\$1.4 million) accounting for the highest absolute increase.

The higher receipts from exports stemmed from increased earnings from five categories— Manufactured Goods (up US\$6.6 million) reflecting higher cement exports; Beverages & Tobacco (up US\$3.0 million); Mineral Fuels, et cetera (up US\$2.1 million); Chemicals (up US\$0.8 million); and Miscellaneous Manufactured Articles (up US\$0.6 million). Declines in the remaining categories, of which Food (down US\$1.4 million) recorded the largest decline, partly offsetting the higher earnings. The lower receipts from food exports was due to reduced export of cereal & cereal preparations, feeding stuff for animals, and miscellaneous edible products, and preparations.

FOREIGN EXCHANGE MARKET

At the end of December 2014, the average nominal exchange rate was \$114.66 per US\$1.00, representing a nominal depreciation of 7.2 per cent relative to the end of December 2013. This translated into real depreciation of 1.6 per cent. This compares with nominal and real depreciation rates of 12.6 per cent and 4.4 per cent at the end of December 2013. Underpinning the slower pace of depreciation for the year was the continued positive impact of the country's performance

TABLE 6.5
MERCHANDISE TRADE WITH CARICOM BY SITC SECTION, 2013, 2014
US\$ MILLION

S.I.T.C. SECTIONS	2013 ^r			2014 ^p			2014/2013 Abs. Change	
	Imports	Exports	Balance	Imports	Exports	Balance	Imports	Exports
All Sections	926.9	79.7	-847.2	764.4	89.8	-674.6	-162.5	10.1
Of which Jamaica Free Zone	5.8	2.6	-3.2	6.4	2.5	-3.9	0.6	-0.1
Food	162.7	35.3	-127.4	147.1	34.0	-113.2	-15.6	-1.4
Beverages & Tobacco	38.9	11.0	-28	35.1	14	-21.1	-3.8	3.0
Crude Materials (excl. Fuels)	0.8	1.4	0.5	1.0	0.7	-0.3	0.2	-0.6
Mineral Fuels, etcetera	649.7	0.7	-649	507.6	2.9	-504.8	-142.1	2.1
Animal & Vegetable Oils & Fats	1.2	0.3	-1.0	1.6	0.1	-1.5	0.4	-0.2
Chemicals	27.6	9.2	-18.4	29.0	10.1	-18.9	1.4	0.8
Manufactured Goods	23.8	14.3	-9.5	21.3	20.9	-0.5	-2.4	6.6
Machinery and Transport Equip.	7.9	1.4	-6.5	8.3	1.3	-7.0	0.4	-0.1
Misc. Manufactured Articles	14.3	4.9	-9.3	13.3	5.5	-7.7	-1.0	0.6
Other	0.0	1.2	1.2	0.0	0.4	0.4	0.0	-0.8

r - revised

p - preliminary

Source: Statistical Institute of Jamaica

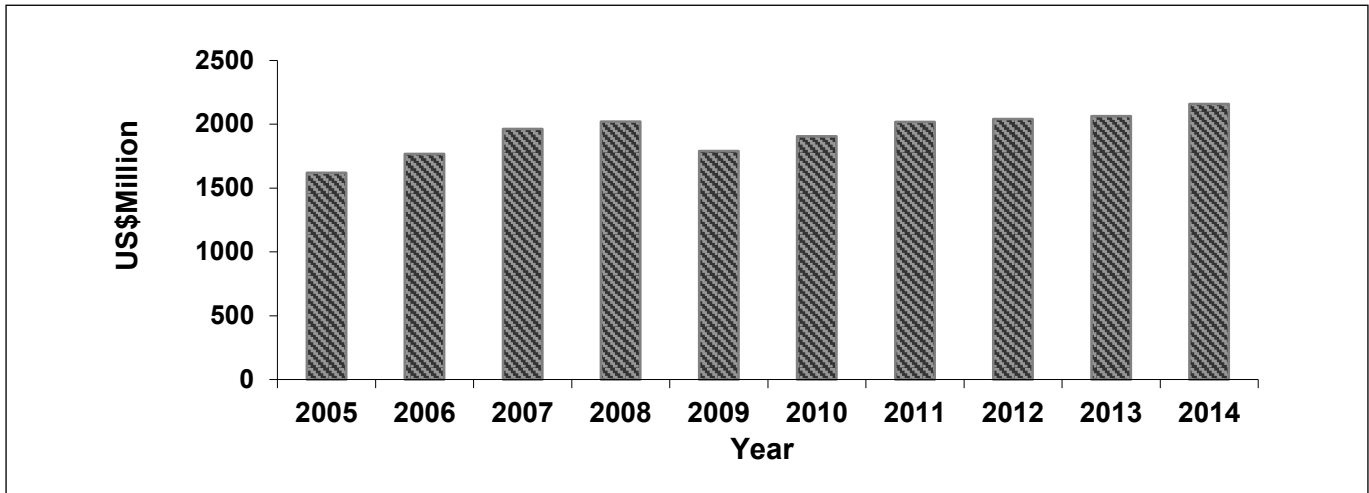


FIGURE 6D: ANNUAL REMITTANCE INFLOWS, 2005–2014

TABLE 6.6
JAMAICA'S REMITTANCES 2013, 2014
US\$ MILLION

Main Channels of Remittances	2013 ^r	2014 ^p	2014/2013	
			Abs. Change	Per Cent Change
Remittance Companies	1 760.6	1 855.8	95.3	5.4
Other Remittances	304.4	303.8	-0.5	-0.2
Total Inflows	2 064.9	2 159.7	94.7	4.6
Total Outflows	240.5	233.1	-7.4	-3.1
Net Remittances	1 824.5	1 926.5	102.1	5.6

p - preliminary

r - revised

Discrepancies in table due to rounding

Source: Bank of Jamaica

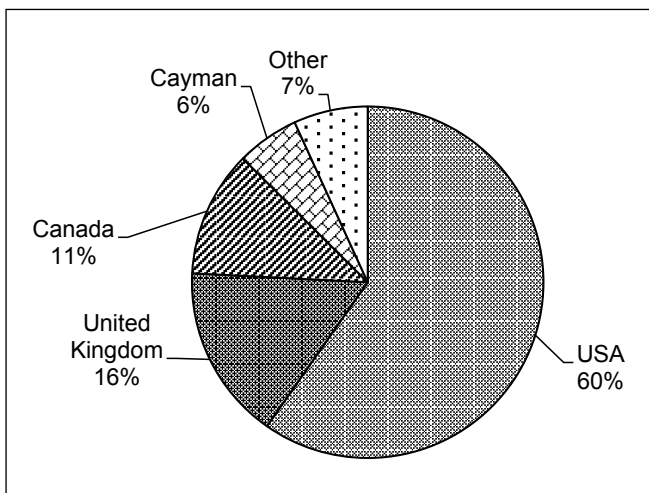


FIGURE 6E: SHARE OF REMITTANCE INFLOWS BY SOURCE COUNTRY, 2014

under the EFF, as expressed by the IMF's Managing Director in June 2014 and greater price stability reflected in the relatively low inflation rate recorded for the year. In addition, the Government's successful Eurobond issue in July 2014 underscored investor confidence in the Government's programme and the country's economic prospects.

Remittances

Remittance inflows for 2014 increased by US\$94.7 million to US\$2 159.7 million, reflecting the third consecutive year in which gross remittances exceeded the global financial and economic crisis out-turn of US\$2 021.3 million recorded in 2008 (Figure 6D). The increases in total inflows stemmed from the net impact of higher flows of US\$95.3 million to Remittance Companies and a decline of US\$0.5 million in Other Remittances (Table 6.6). Total outflows were US\$233.1 million, declining by US\$7.4 million relative to 2013. The increased inflows and the reduction in outflows led

to an increase of US\$102.1 million to US\$1 926.5 million in net remittances.

Remittances of US\$1 289.8 million from the United States represented the largest share from any source country, accounting for 60.0 per cent of Jamaica's total inflows for 2014 (Figure 6E). The remainder was divided among the United Kingdom which accounted for 16.0 per cent; Canada, 11.0 per cent; while Cayman and Other Countries accounted for 6.0 and 7.0 per cent, respectively (Figure 6E).

OUTLOOK

Global growth is projected to be positive in the short-medium-term with higher output of 3.5 and 3.7 per cent projected for 2015 and 2016, respectively. The USA, Jamaica's main trading partner, is expected to record higher output of 3.6 per cent in 2015. The projected increase in global output is expected to benefit from lower oil prices, reflecting mainly higher supply.

Domestically, real value added growth is anticipated, as the economy is expected to benefit from lower crude oil prices and a more favourable external demand environment. Additionally, visitor arrivals are projected to increase which should positively impact Current Account transactions. Further improvement in investor confidence, stemming from the continued attainment of the targets under the EFF-supported programme and the implementation of critical structural reforms, is also anticipated.

With respect to trade negotiations, it is anticipated that the Doha Round of Negotiations will be concluded by the end of 2015. This expectation is based on broad agreement among advanced and developing countries who have agreed to accelerate negotiations to draw up the precise modalities in agriculture, industrial goods and services by the end of July 2015 with the aim of concluding a final agreement in December at the WTO conference in Nairobi, Kenya. ■

MONEY & INFLATION

INTRODUCTION

Jamaica's monetary policy operated during 2014 within the context of the Government of Jamaica's (GoJ's) commitment to its economic programme underpinned by a four-year (FY2013/14–FY2016/17) Extended Fund Facility (EFF) arrangement with the International Monetary Fund (IMF) valued at SDR 615.38 million (about US\$944 million¹ at the time of approval). The programme, which aims to secure sustainable growth in a stable macroeconomic environment, remained on track as Jamaica satisfied all the quantitative targets and structural benchmarks outlined in the EFF since the start of the programme. This was evident in the passing of four quarterly reviews during the year, bringing the total to six successful reviews of Jamaica's macroeconomic performance to the end of December 2014. Realized gains during the year included:

- expansion in the Net International Reserves (NIR)
- lower levels of inflation
- improved current account balance
- the Government's successful Eurobond issue in July 2014–Jamaica's largest international bond issue on record
- improvements in business and consumer confidence–recorded annual gains of 25.1 per cent and 16.2 per cent, respectively
- improved ranking in doing business²–rose to 58 out of 189 countries relative to 85 of 189 countries in 2013
- improved ranking in global competitiveness³–increased to 86 out of 144 relative to 94 of 148 in 2013.

The Bank of Jamaica (BOJ) remained committed to meeting the monetary targets under the EFF, while achieving low and stable inflation. Consistent with this commitment, the Central

Bank met all monetary targets while the inflation out-turn was the lowest for a calendar year since 2011. However, despite the favourable out-turn, inflation expectations remained at an elevated level. In this regard, the BOJ maintained the interest rate payable on its 30-day Certificate of Deposit (CD) during 2014. In addition, the cash reserve and liquid assets requirements, and the rate on the Bank's overnight instrument remained unchanged. The Bank also continued to manage liquidity through the offer of special and regular Open Market Operations (OMO) securities. In keeping with its efforts to improve liquidity assurance in the financial system, the Central Bank continued to offer repurchase arrangements via the Enhanced Liquidity Management Framework (ELMF) that was implemented in 2013 and introduced a Six Month Repurchase Operation (SMRO) on 14 February 2014. This improvement reflected continued enhancements to the Central Bank's liquidity management framework.

Inflation for 2014 was 6.4 per cent, 3.1 percentage points lower than the rate recorded for 2013. Inflationary impulses during 2014 stemmed mainly from:

- the impact of severe drought conditions
- increase in bus fares for Jamaica Urban Transit Company (JUTC) adult passengers
- the pass-through effect of the depreciation of the domestic currency
- increase in the National Minimum Wage

The inflation out-turn was, however, constrained by weak domestic demand conditions and lower international crude oil prices.

At the end of 2014, the exchange rate was \$114.66 per US\$1.00, representing a nominal depreciation of 7.2 per cent compared with the rate at the end of 2013. Real depreciation for the Jamaica Dollar was 1.6 per cent relative to the rate at the end of 2013.

1. The value represented 225.0 per cent of Jamaica's quota with the IMF. Each member country of the IMF is assigned a quota, based broadly on its relative position in the world economy. A member country's quota determines its maximum financial commitment to the IMF, its voting power, and its access to IMF financing.

2. Doing Business Survey of the World Bank 2014.

3. Global Competitiveness Report 2014–2015.

POLICY FRAMEWORK

Monetary policy continued to be guided by the GoJ's Memorandum of Economic and Financial Policies (MEFP), which accompanied its Letter of Intent to the IMF.⁴ The objective of monetary policy is to maintain single-digit inflation within the framework of a managed floating exchange rate regime. The BOJ continued to focus on achieving the monetary targets under the programme, while constraining inflationary impulses and responding to liquidity pressures in the financial system. The interest rate on the BOJ's 30-day certificate of deposit continued to be the primary instrument of monetary policy during the short-term and may be adjusted based on the Central Bank's assessment of risks to the inflation target.

Selected medium-term macroeconomic targets outlined in the programme for FY 2014/15 were:

- real Gross Domestic Product (GDP) growth of 1.4 per cent
- inflation rate in the range of 7.0 per cent to 9.0 per cent
- Net International Reserves (NIR) of US\$1 594 million
- fiscal deficit of 0.5 per cent of GDP
- primary surplus of 7.5 per cent of GDP
- current account deficit of 8.0 per cent of GDP.

TABLE 7.1
INTEREST RATES ON BOJ CERTIFICATE OF DEPOSIT
AND GoJ INSTRUMENTS, 2013 AND 2014

End of Period	BOJ's CD		T-BILL Rates ^b	
	30-day	28-day	91-day	182-day
2013	5.75 ^a	6.25	7.53	8.25
2014	5.75	6.38	6.96	7.14

a-The rate was changed on February 25, 2013

b-GoJ instrument

Source: Bank of Jamaica

During 2014, the IMF completed four quarterly reviews of Jamaica's macroeconomic performance for October–December 2013 and for the first three quarters of 2014. Jamaica satisfied all the quantitative targets and structural benchmarks outlined in the arrangement under the EFF. This facilitated the disbursements of US\$71.4 million, US\$70.9 million, US\$68.8 million and US\$66.8 million for the respective quarters and resulted in total disbursements of approximately US\$277.8 million for the year and US\$546.4 million since the start of the programme in FY 2013/14.

Monetary Policy Management

The Central Bank maintained its policy interest rate on its 30-day certificate at 5.75 per cent for 2014.⁵ (Table 7.1 and

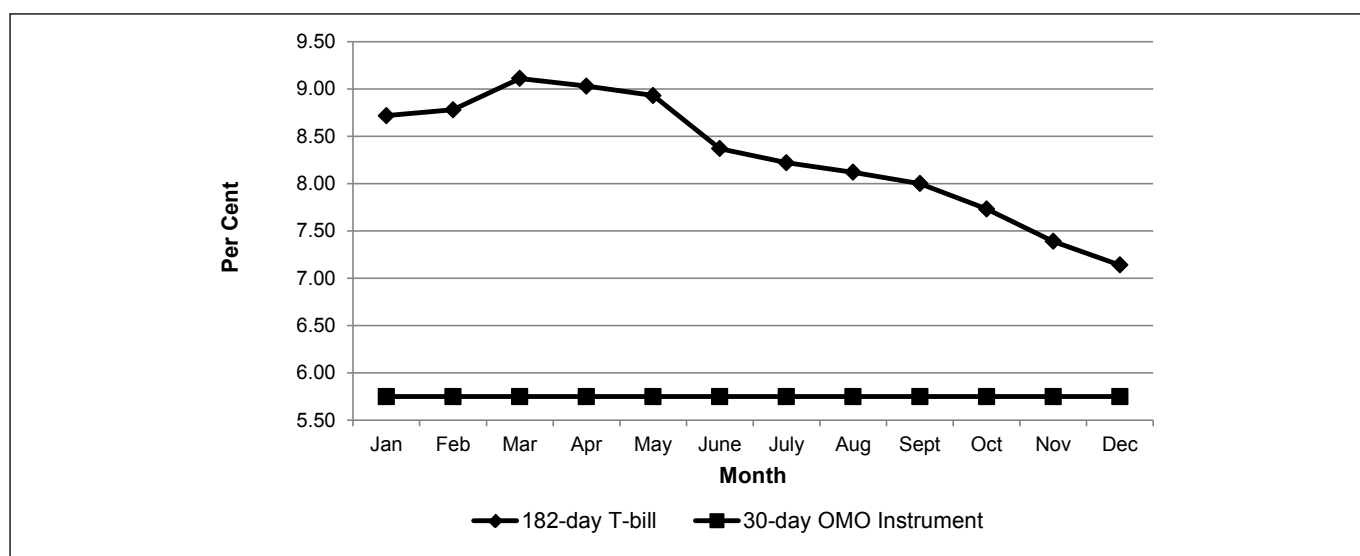


FIGURE 7A: MOVEMENTS IN INDICATIVE INTEREST RATES, 2014

4. 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.
5. The Central Bank policy rate was lowered by 50.0 basis points to 5.75 per cent on February 25, 2013.

TABLE 7.2
SUMMARY OF THE MONETARY AUTHORITY'S ACCOUNTS, 2012–2014
(\$ Million)

	Stock ^a			Flows			Percentage Change in Stock		
	2012	2013	2014	2012	2013	2014	2012/11	2013/12	2014/13
NIR (US\$M)	1 125.6	1 047.8	2 001.1	-840.5	-77.8	953.3	-42.8	-6.9	91.0
NIR	100 570.8	111 468.2	212 876.0	-75 101.1	10 897.4	101 407.8	-42.8	10.8	91.0
NDA	-2 922.4	-7 834.8	-103 993.4	81 039.4	-4 912.4	-96 158.6	-96.5	-168.1	-1 227.3
Net Claims on Public Sector	137 631.9	157 750.3	142 303.0	41 091.5	20 118.4	-15 447.3	42.6	14.6	-9.8
Net Credit to Banks	-16 413.6	-21 500.4	-23 210.1	-2 246.0	-5 086.8	-1 709.7	-15.9	-31.0	-8.0
Open Market Operations	-47 675.5	-49 948.2	-25 480.8	51 224.4	-2 272.7	24 467.4	-51.8	4.8	-49.0
Other	-76 465.2	-86 702.6	-197 605.5	-9 030.3	-10 237.4	-110 902.9	-13.4	-13.4	-127.9
MONETARY BASE	97 648.5	103 633.4	108 882.5	5 938.4	5 984.9	5 249.1	6.5	6.1	5.1
Currency Issue	64 684.1	69 801.7	74 937.1	2 037.4	5 117.6	5 135.4	3.3	7.9	7.4
Cash Reserve	31 808.9	33 593.3	33 685.0	2 986.2	1 784.4	91.7	10.4	5.6	0.3
Current A/C	1 155.5	238.4	260.5	914.8	-917.1	22.1	380.1	-79.4	9.3

a-End of period

Source: Bank of Jamaica

Figure 7A). This policy stance was consistent with inflation performance remaining favourable relative to the BOJ's target range and the need to meet the monetary targets under the EFF supported programme. The cash reserve and liquid assets requirements were maintained at 12.0 per cent and 26.0 per cent, respectively. Also, the rate on the Central Bank's overnight instrument was maintained at 0.25 per cent.

To manage Jamaica Dollar liquidity in the market, the BOJ issued fixed and variable-rate instruments to primary dealers and commercial banks. These operations were complemented by increases in the amount of liquidity the Central Bank made available to deposit-taking institutions through repurchase arrangements.

Consequent to the improvement in domestic liquidity, there were declines in both the 182-day and 91-day Treasury Bill (T-Bill) rates. In addition, a trend reduction in inflation expectations and strong demand for GoJ instruments, as reflected in significant oversubscriptions, also influenced T-Bill rates. At the end of 2014, the 182-day and 91-day T-bill rates fell from 8.25 per cent and 7.53 per cent at the end of 2013, respectively, to 7.14 per cent and 6.96 per cent (see Table 7.1). In contrast, the 28-day T-Bill rate was 6.38 per cent relative to 6.25 per cent at the end of 2013.

The average weighted selling rate of the United States dollar at the end of the year was \$114.66 per US\$1.00 relative to \$106.38 to US\$1.00 at the end of 2013. This represented nominal and real depreciation rates of 7.2 per cent and 1.6

per cent, respectively. The rates for 2013 were 12.6 per cent and 4.4 per cent, respectively. This reflected a decreased pace of depreciation relative to 2013 as a declining trend in the net demand⁶ for foreign currency by end-users was observed. For the period under review, it was estimated that the fall in net demand was primarily influenced by respective increases of 7.9 per cent and 4.6 per cent in inflows from travel and current transfers, while the value of fuel imports declined by 6.6 per cent relative to 2013. Consequently, Net Private Capital (NPC) inflows were more than sufficient to cover the net demand for current account transactions, which resulted in a 91.0 per cent expansion in the NIR.

Monetary Base

At the end of 2014, the Monetary Base was \$108.9 billion, \$5.2 billion higher than at the end of 2013 (Table 7.2). This was the net effect of an improvement of \$101.4 billion in the NIR and a decline of \$96.2 billion in Net Domestic Assets (NDA).

At the end of 2014, the NIR was US\$2 001.1 million, an increase of US\$953.3 million relative to the end of 2013 (see Table 7.2). The expansion in the NIR partly reflected foreign currency purchases under the Public Sector Entity facility and net placements on the BOJ's USD Certificates of Deposits. The increase also reflected the GoJ's receipt of US\$800.0 million from its Eurobond issue on the international capital market in July 2014. Since the Eurobond bond issuance, Jamaica's sovereign bond spread on the secondary international market

6. This represents the overall cash demand for balance of payments current account transactions and is calculated as the difference between estimated current account cash inflows and outflows.

has continued to decline, mirroring lower spreads on emerging market sovereign debt and increasing market confidence in Jamaica's economic prospects. Gross International Reserves (GIR)⁷ amounted to US\$2 473.0 million as at December 31, 2014 and represented 18.4 weeks of estimated goods and services imports relative to 12.6 weeks at the end of 2013.

The lower NDA resulted from declines in both the Net Claims on Public Sector and Other categories. The reduction in the Net Claims on Public Sector category was due to an increase in Central Government's deposits at the BOJ which was partly offset by a decline in Open Market Operation (OMO) liabilities. An increase in the Jamaica Dollar equivalent of placements on BOJ USD CDs, reflected in the category Other, also contributed significantly to the lower NDA.

The expansion in the Monetary Base was reflected in respective increases of \$5 135.4 million, \$91.7 million and \$22.1 million in net Currency Issue, commercial banks' Cash Reserves and the Current Account of commercial banks (see Table 7.2).

Money Supply

Total Assets of the banking system increased by 35.6 per cent to \$876.1 billion (Table 7.3). This was due to increases of 73.4 per cent and 16.3 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 45.3 per cent to \$193.0 billion) and the Private Sector (up 4.4 per cent to \$332.9 billion). The rise in Net Foreign Assets was partly influenced by the continued depreciation of the domestic currency.

There was a 35.6 per cent increase in Total Liabilities from \$645.8 billion. This was the result of increases in: Currency in circulation (up 8.4 per cent to \$63.6 billion); Demand Deposits (up 12.6 per cent to \$101.4 billion); Time Deposits (up 4.0 per cent to \$66.9 billion); Saving Deposits (up 5.8 per cent to \$214.7 billion); and Other Items (up 86.9 per cent to \$429.5 billion).

Total liquidity, as measured by broad money (M2) and narrow money (M1) each as a percentage of GDP, declined relative to 2013 (Figure 7B). M2 over GDP was 28.8 per cent relative to 29.1 per cent during 2013 and M1 over GDP decreased from 10.4 per cent to 8.8 per cent. Both indicators reflected the BOJ's lowering of its policy rate (30-day OMO) in 2013.

INFLATION

Consumer Price Index (CPI)

For 2014, the point-to-point inflation as measured by the All Jamaica 'All Divisions' Consumer Price Index was 6.4 per cent relative to 9.5 per cent in 2013 (Table 7.5) {Figure 7C}. This was the lowest rate recorded for a calendar year since 2011 when the inflation out-turn was 6.0 per cent. Core inflation⁸ stood at 6.0 per cent during 2014 compared with 7.4 per cent in 2013. During the review year, the Food & Non-Alcoholic Beverages; Transport; and Miscellaneous Goods & Services divisions accounted for approximately 82.4 per cent of inflation. The annual average inflation rate was 8.3 per cent, 1.1 percentage points below the average rate recorded in 2013.

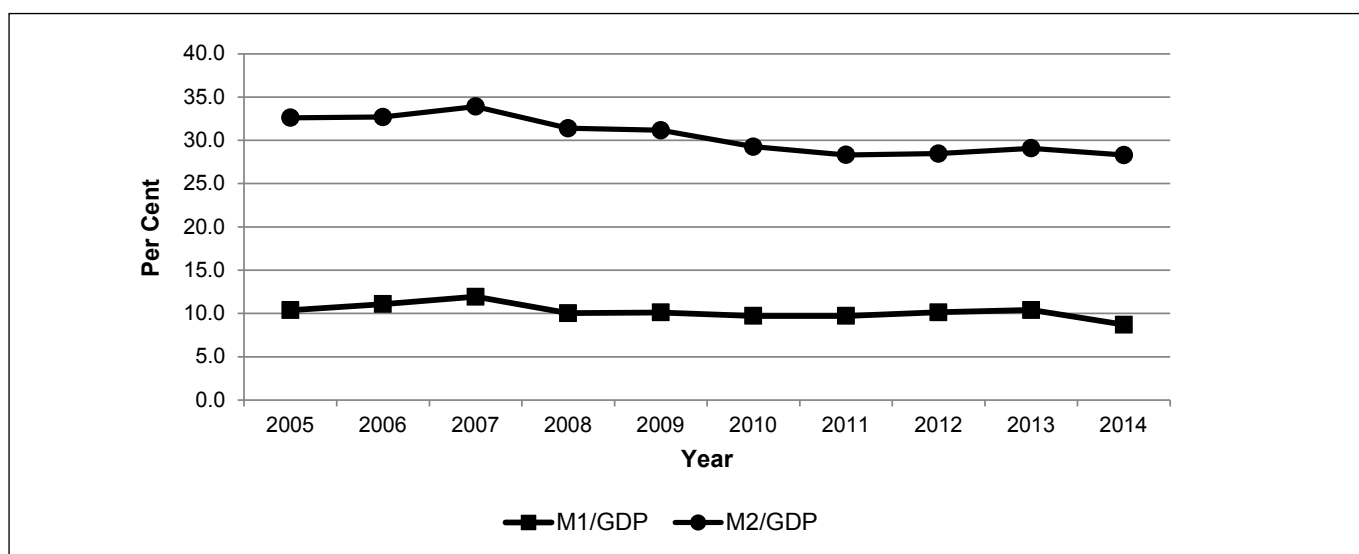


FIGURE 7B: TOTAL LIQUIDITY IN THE ECONOMY, 2005–2014

7. The minimum international standard for GIR is 12.0 weeks of estimated goods and services imports.

8. This measure of inflation excludes the agriculture and fuel components.

TABLE 7.3
DETERMINANTS OF MONEY SUPPLY, 2012–2014
\$Million

ASSETS	Stock ^a			Flows			Percentage Change in Stock		
	2012 ^r	2013 ^r	2014 ^p	2012	2013	2014	2012/11	2013/12	2014/13
Net Foreign Assets	192 255.5	219 187.0	379 998.0	-36 929.5	26 931.5	160 811.0	-16.1	14.0	73.4
Domestic Credit	385 224.4	426 653.9	496 083.1	40 132.9	41 429.5	69 429.2	11.6	10.8	16.3
To Public Sector (net)	130 471.7	132 761.6	192 963.0	1 518.9	2 289.9	60 201.4	1.2	1.8	45.3
To Private Sector	276 182.2	318 881.2	332 867.8	40 735.7	42 699.0	13 986.6	17.3	15.5	4.4
To Other Financial Institutions (net)	-21 429.6	-24 989.0	-29 747.7	-2 121.7	-3 559.4	-4 758.7	-11.0	-16.6	-19.0
TOTAL ASSETS	577 479.8	645 840.9	876 081.1	3 203.3	68 361.0	230 240.2	0.6	11.8	35.6
LIABILITIES									
Narrow Money (M1)	133 264.5	148 734.0	165 004.2	12 694.6	15 469.5	16 270.2	10.5	11.6	10.9
Currency	54 734.7	58 641.4	63 577.3	1 880.9	3 906.7	4 935.9	3.6	7.1	8.4
Demand Deposits	78 529.8	90 092.6	101 426.9	10 813.8	11 562.8	11 334.3	16.0	14.7	12.6
Quasi Money	241 202.8	267 219.8	281 530.1	10 354.1	26 017.0	14 310.3	4.5	10.8	5.4
Time Deposits	61 215.6	64 328.3	66 872.7	5 917.7	3 112.7	2 544.3	10.7	5.1	4.0
Saving Deposits	179 987.2	202 891.5	214 657.4	4 436.4	22 904.3	11 765.9	2.5	12.7	5.8
Broad Money (M2)	374 467.3	415 953.8	446 534.3	23 048.8	41 486.5	30 580.5	6.6	11.1	7.4
Other Items (net)	203 012.6	229 887.1	429 546.8	-19 845.4	26 874.5	199 659.7	-8.9	13.2	86.9
TOTAL LIABILITIES	577 480.0	645 840.9	876 081.1	3 203.3	68 361.0	230 240.2	0.6	11.8	35.6

a-End of period

r - revised

p - preliminary

Source: Bank of Jamaica

All three regions recorded lower inflation relative to the preceding year. Inflation for the Greater Kingston Metropolitan Area was 8.6 per cent relative to 9.6 per cent in 2013. For Other Urban Centres, the inflation out-turn was 5.7 per cent, down 4.4 percentage points. Rural Areas recorded the lowest increase in prices of 4.9 per cent, 4.1 percentage points lower than 2013 (Table 7.4).

TABLE 7.4
PERCENTAGE CHANGE IN
THE CONSUMER PRICE INDEX BY REGION

	2010	2011	2012	2013	2014
Greater Kingston					
Metropolitan Area	13.6	7.0	10.0	9.6	8.6
Other Urban Centres	12.0	5.6	6.9	10.1	5.7
Rural Areas	10.3	5.5	6.9	9.0	4.9

Source: Statistical Institute of Jamaica

The inflation out-turn for 2014 emanated primarily from domestic sources. Inflationary pressures originated mainly from:

- severe drought conditions which adversely impacted the production of agricultural products, resulting in higher prices, particularly for Vegetables and Starchy Foods
- an increase in bus fares for Jamaica Urban Transit Company (JUTC) adult passengers
- an increase in the National Minimum Wage, effective January 6, 2014
- the depreciation of the Jamaica Dollar.

Prices were, however, constrained by weak domestic demand as well as lower crude oil and grains prices on the international market. The decrease in the West Texas Intermediate (WTI) crude oil price, to which Jamaica's energy prices are linked, stemmed primarily from growth in the United States of America's (USA) shale oil production; robust global supply; and weakened prospects for growth in the world economy which adversely impacted oil demand.

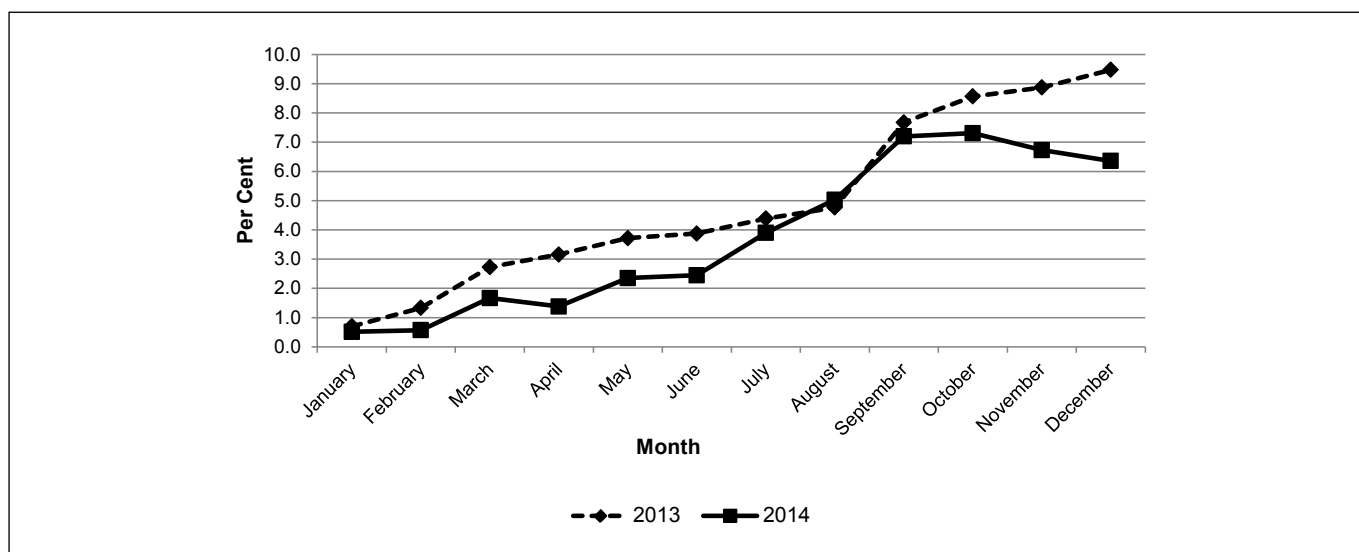


FIGURE 7C: CALENDAR YEAR TO DATE INFLATION, 2013–2014

Lower grain prices resulted mainly from record harvests in the USA and expanding global inventories.

The index for **Food & Non-Alcoholic Beverages** increased by 10.1 per cent and accounted for approximately 63.1 per cent of overall inflation (see Table 7.5 and Figure 7D). This reflected upward movements in the indices for Food (10.2 per cent) and Non-Alcoholic Beverages (7.9 per cent). Within Food, Vegetables & Starchy Foods (up 16.7 per cent); Meat (up 7.5 per cent); Bread & Cereals (up 7.3 per cent); Fish & Seafood (up 7.6 per cent); and Milk, Cheese & Eggs (up 12.5 per cent) were the largest contributors to the out-turn. The main factor contributing to the higher index for **Food & Non-Alcoholic Beverages** was severe drought conditions, particularly in June and July⁹, which hindered production. As a consequence, there were higher prices for domestically produced crops such as cabbage, carrot, escallion, tomato, irish and sweet potato, and yellow yam.

With respect to Non-Alcoholic Beverages, there were respective increases of 8.6 per cent and 7.6 per cent in the indices for Coffee, Tea & Cocoa and Mineral Waters, Soft Drinks, Fruit & Vegetable Juices.

For the division **Alcoholic Beverages & Tobacco** the index rose by 5.7 per cent. This increase reflected the higher cost of spirits, wines, beers and tobacco products; stemming mainly from the implementation of an increase in the Special Consumption Tax (SCT)¹⁰ on all alcoholic beverages, effective April 22, 2014 and the depreciation in the exchange rate.

The **Clothing & Footwear** index increased by 5.0 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 4.4 per cent. There was a 5.8 per cent increase in the index for Footwear.

The index for **Housing, Water, Electricity, Gas & Other Fuels** declined by 2.0 per cent. This out-turn constrained inflation by 4.3 per cent. The lower index was due to the groups Electricity, Gas & Other Fuels and Water Supply & Miscellaneous Services Relating to the Dwelling, which decreased by 4.3 per cent and 1.1 per cent, respectively. The decline in the former reflected a decrease in the fuel component of electricity bills, which were adjusted to account for lower international crude oil prices. WTI crude oil prices declined by 45.9 per cent to US\$53.45 per barrel on an annual point to point basis as at end December 2014. The lower index for Water Supply & Miscellaneous Services Relating to the Dwelling resulted from the cheaper cost of electricity, which is used to operate pumping stations.

The index for **Furnishings, Household Equipment & Routine Household Maintenance** registered an increase of 8.4 per cent (see Table 7.5). All six groups within this division recorded increases, with the largest contributor being Goods & Services for Routine Household Maintenance¹¹ (up 10.2 per cent). This upturn reflected the increase in the national minimum wage from \$5 000.00 to \$5 600.00 per 40-hour work week effective January 6, 2014 and the associated

9. The Meteorological Service of Jamaica reported that the island recorded 33.0 per cent and 37.0 per cent of normal rainfall for June and July of 2014, respectively.

10. The SCT increased to \$1 120.0 per litre of pure alcohol from \$700.0.

11. 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.

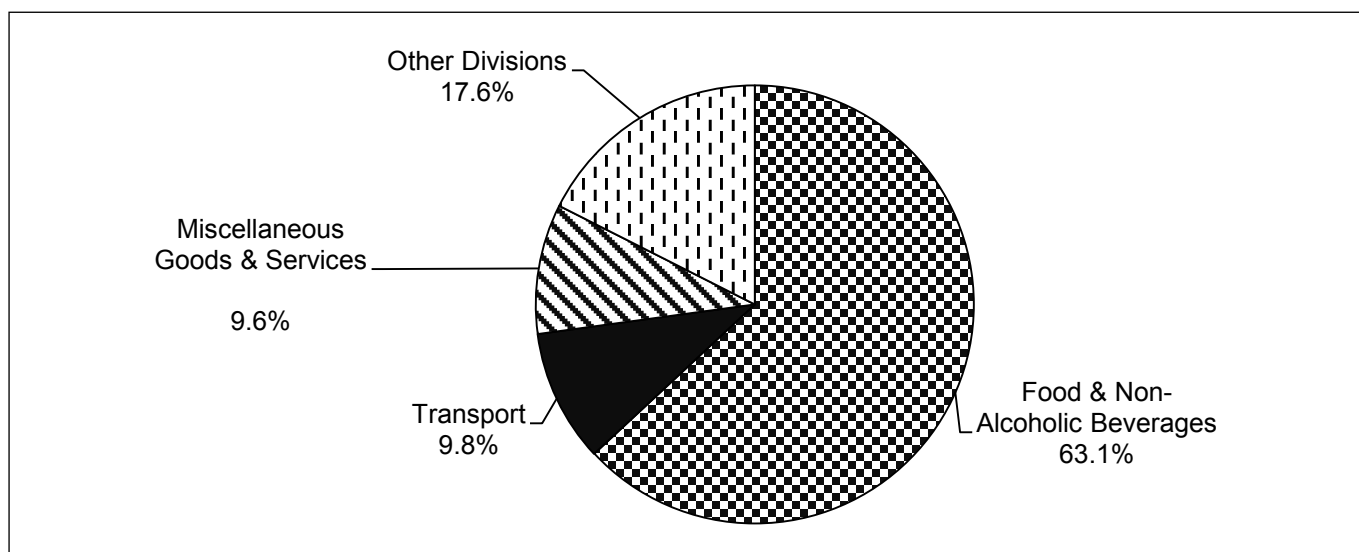


FIGURE 7D: PERCENTAGE CONTRIBUTION TO INFLATION, 2014

adjustments in the salaries of some employees. The minimum wage for industrial security guards was also increased from \$7 320.40 to \$8 198.80 per 40-hour work week.

There was a 3.5 per cent increase in the **Health** index. This reflected higher indices of 3.8 per cent and 3.2 per cent for Medical Products, Appliances & Equipment¹² and Health Services, respectively. The division was influenced by:

- increased cost for medical fees, pharmaceutical and other medical products
- the depreciation in the exchange rate
- increased demand for medical treatment of viral illnesses that affected the population.

Transport-related expenses increased by 4.6 per cent and accounted for 9.8 per cent of inflation (see Table 7.5 and Figure 7D). This out-turn was attributable to the higher cost for: (i) bus fares by the JUTC Limited effective August 24, 2014, which increased to \$120.00 from \$100.00 for adults; (ii) new motor vehicles; and (iii) airfares. The out-turn in the division was partly offset by the reduced cost for petrol and related products as a result of lower international crude oil prices, particularly during the latter half of the year.

The index for **Communication** remained unchanged. This reflected the continued intense competition in that industry.

The index for **Recreation & Culture** rose by 5.1 per cent. This primarily reflected increased prices for: (i) newspapers; (ii) Gardens & Pets; (iii) Other Recreational Items & Equipment; (iv) stationery, drawing material and books; (v) component sets; and (vi) items in Audio-Visual, Photographic & Information Processing Equipment.

Expenses related to **Education** increased by 3.9 per cent. This upturn was influenced by higher tuition fees in September for the academic year 2014/15 and the increased cost of examination fees.

The index for **Restaurants & Accommodation Services** rose by 4.5 per cent. The increased prices for catering and accommodation services resulted in the higher index for this division. Contributing to the increased cost for catering services were the higher prices for food, alcoholic beverages and transportation.

There was a 6.8 per cent increase in the index for the **Miscellaneous Goods & Services** division. The main contributors to the upturn were higher prices for: (i) personal care items and effects¹³; (ii) funeral services; and (iii) insurance premiums.

Producer Price Index (PPI)¹⁴

For 2014, input costs received by suppliers in the Mining & Quarrying and the Manufacture industries increased, as

12. Items in this group include spectacles, bandages, cold/fever medicines, family planning supplies and prescription drugs.

13. Personal care items include hair dryer, electric shaver, toothpaste, toothbrush, mouthwash, shampoo, conditioner, deodorant, soap and toilet paper, while effects entails jewellery, suitcases, handbags and lighters.

14. 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, 2010–2014

	Point-To-Point					Annual Average				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
ALL DIVISIONS	11.7	6.0	8.0	9.5	6.4	12.6	7.5	6.9	9.4	8.3
FOOD & NON-ALCOHOLIC BEVERAGES	12.8	5.4	14.3	7.9	10.1	10.1	7.7	10.8	12.5	8.6
FOOD	13.1	5.2	14.7	7.7	10.2	10.1	7.6	10.9	12.6	8.7
Bread & Cereals	6.4	8.2	8.2	7.6	7.3	5.6	8.9	6.4	9.3	7.2
Meat	8.6	9.1	11.7	7.1	7.5	9.3	8.4	10.3	9.4	6.7
Fish & Seafood	10.5	8.1	12.9	4.4	7.6	12.2	8.2	10.9	8.1	5.6
Milk, Cheese & Eggs	9.9	9.3	15.8	13.3	12.5	9.2	10.0	11.9	14.7	12.9
Oils & Fats	11.6	6.7	9.4	11.4	8.1	10.1	8.5	8.2	11.1	9.3
Fruit	12.4	17.0	18.0	20.3	13.3	9.6	16.2	16.3	22.8	14.6
Vegetables & Starchy Foods	27.5	-8.8	28.4	5.7	16.7	10.5	1.9	14.4	21.9	11.2
Sugar, Jam, Honey & Confectionery	12.2	20.2	7.2	7.5	6.4	20.9	11.5	16.5	6.7	7.3
Food Products	13.1	7.1	10.2	7.3	8.1	15.2	8.8	8.9	8.7	7.2
NON-ALCOHOLIC BEVERAGES	9.1	9.4	8.4	11.5	7.9	10.9	8.7	9.0	11.3	8.0
Coffe, Tea & Cocoa	10.9	16.9	13.0	12.6	8.6	13.0	13.4	14.8	14.4	8.5
Mineral Water, Soft Drinks, Fruit & Vegetable Juices	8.5	6.6	6.6	11.0	7.6	10.1	7.0	6.7	10.0	7.8
ALCOHOLIC BEVERAGES & TOBACCO	14.4	5.1	6.1	11.0	5.7	20.9	5.8	4.7	10.0	6.3
CLOTHING & FOOTWEAR	9.0	8.7	11.6	9.2	5.0	9.8	8.0	10.3	11.3	5.8
Clothing	10.2	10.3	12.0	9.9	4.4	9.7	9.7	11.2	11.8	6.0
Footwear	7.2	6.3	11.1	8.1	5.8	10.0	5.7	9.1	10.5	5.5
HOUSING, WATER, ELECTRICITY, GAS & OTHER FUELS	8.4	12.3	5.3	11.5	-2.0	20.6	12.3	5.9	8.6	6.5
Rentals for Housing	21.2	5.5	1.6	1.2	1.2	33.3	5.1	5.4	1.0	1.1
Maintenance & Repair of the Dwelling	10.0	7.2	8.9	14.4	5.0	9.2	7.2	8.3	13.2	7.0
Water Supply & Miscellaneous Services Relating to the Electricity, Gas & Other Fuels	5.9	12.7	6.6	28.7	-1.1	13.0	10.4	6.3	15.5	18.5
	2.6	16.5	6.6	13.1	-4.3	17.2	17.3	5.8	10.7	6.5
FURNISHINGS, HOUSEHOLD EQUIPMENT & ROUTINE HOUSEHOLD MAINTENANCE	7.0	7.3	8.6	7.3	8.4	8.4	7.3	7.0	8.8	8.7
Furniture & Furnishings, Carpets & Other Floor Coverings	9.2	9.1	9.5	8.3	4.3	9.3	7.7	10.0	8.7	6.1
Household Textiles	7.8	9.4	9.3	6.6	4.1	6.8	8.0	9.3	9.1	4.7
Household Appliances	10.4	4.8	11.1	8.4	7.8	12.0	5.5	8.1	10.3	7.0
Glassware, Tableware & Household Utensils	7.8	7.1	10.4	7.6	4.5	7.5	7.4	9.1	9.6	5.1
Tools & Equipment for House & Garden	7.2	4.0	4.4	10.0	4.8	7.1	5.1	3.8	7.6	7.3
Goods & Services for Routine Household Maintenance	5.8	7.4	8.0	6.8	10.2	7.8	7.6	6.1	8.5	10.1
HEALTH	2.9	2.5	3.1	5.9	3.5	3.2	2.3	2.9	5.2	4.1
Medical Products, Appliances & Equipment	2.5	2.9	4.3	6.7	3.8	3.6	2.7	3.5	6.1	4.9
Health Services	3.1	2.2	2.4	5.4	3.2	3.0	2.1	2.6	4.7	3.7
TRANSPORT	25.7	3.5	2.5	20.4	4.6	23.9	7.4	2.5	8.3	14.7
COMMUNICATION	5.3	3.1	-39.4	-4.2	0.0	5.9	2.7	-18.4	-25.8	-2.3
RECREATION & CULTURE	6.9	3.0	6.6	5.9	5.1	10.5	3.8	5.0	6.6	4.9
EDUCATION	8.0	8.6	3.7	4.0	3.9	7.7	6.6	6.7	3.6	4.0
RESTAURANTS & HOTELS	5.5	2.3	5.3	7.8	4.5	6.4	3.4	3.8	8.0	5.4
MISCELLANEOUS GOODS & SERVICES	8.7	5.5	6.0	10.3	6.8	11.7	6.7	6.1	8.2	8.4

Source: Statistical Institute of Jamaica

demonstrated in the upward movement in the PPI. Input costs for the Mining & Quarrying industry increased by 17.3 per cent relative to 12.6 per cent during 2013. The PPI for the Manufacture industry increased by 2.7 per cent compared with 9.3 per cent in 2013. These upward movements resulted from higher production costs associated with the increased cost of raw materials. In particular, the industries were affected by the depreciation of the domestic currency and the impact of the severe drought conditions on the food processing component of the Manufacture industry. The increases were, however, constrained by lower international crude oil prices.

The higher PPI for the Mining & Quarrying industry was due to increases for the groups *Bauxite Mining & Alumina Processing* (17.6 per cent) and *Other Mining & Quarrying* (8.9 per cent). The rise in the index for Manufacture was influenced mainly by the groups: *Food, Beverages & Tobacco* (8.6 per cent); *Rubber & Plastic Products* (19.5 per cent); *Fabricated Metal Products excl. Machinery & Equipment* (12.4 per cent); *Chemicals & Chemical Products* (4.8 per cent); and *Other Non-Metallic Mineral Products* (8.3 per cent). Conversely, the group *Refined Petroleum Products* decreased by 23.1 per cent.

OUTLOOK

Within the domestic environment, it is anticipated that inflation¹⁵ during 2015 will result from:

- the depreciation of the Jamaica Dollar against the US Dollar
- administrative increases in the prices of some goods, specifically: an additional SCT of \$7.00 per litre of petrol effective March 18, 2015; an increase in the SCT per stick of cigarette from \$10.50 to \$12.00 effective March 13, 2015; and the extension of the environmental levy, which is 0.5 per cent of the Cost, Insurance and Freight value of imported goods, on CARICOM imports.

With respect to inflationary impulses emanating from international sources, grain prices are expected to be higher on the international market due to signs of increasing demand and lower production in some regions. Global wheat stockpiles are projected to be lower due to US ranchers using more of the grain in livestock feed and reduced production in Brazil.

Global corn stockpiles are also forecast to be lower due to reduced production in South Africa and Belarus as well as decreased supplies in the USA, reflecting increased usage for feed and ethanol production. Global ending stocks for rice are projected to be lower, influenced by reduced forecasts for Thailand and Cambodia.

Crude oil prices are forecast to remain below US\$60.00 per barrel as higher global supplies should be sufficient to meet demand. The US Energy Information Administration's Short-Term Energy Outlook¹⁶ reported that crude oil prices are projected to average US\$52.15 per barrel for 2015 relative to US\$93.26 per barrel during 2014. The projection is based on crude oil prices being constrained by continued growth in the USA's shale oil production; strong global supply; and a weaker outlook for oil demand. The first half of the year is expected to reflect continuing increases in USA's crude oil inventories. For the second half of the year, global inventory increases are projected to moderate as demand rises and non-Organization of the Petroleum Exporting Countries (OPEC) supply growth slows, particularly in the USA because of lower oil prices. ■

15. Inflation for FY 2015/16 is projected at 6.3 per cent. This is the target listed under the medium-term macroeconomic programme.

16. This report was published on February 10, 2015.

FISCAL ACCOUNTS

INTRODUCTION

The Central Government budget for fiscal year FY2014/15 was prepared within the context of the Government's Medium-Term Economic Programme, which seeks to reduce the debt-to-GDP ratio, through a fiscal consolidation programme and accelerate economic growth by creating an enabling business environment. The major strategies and programmes used by the Government of Jamaica (GoJ) to achieve these goals are outlined in the Memorandum of Economic and Financial Policies (MEFP) of the four-year Extended Arrangement under the Extended Fund Facility (EFF¹) with the International Monetary Fund. This is valued at SDR² 615.38 million (approximately US\$932 million at the time of approval). The FY2014/15 budget was therefore predicated on prudent expenditure management and improved tax reform and compliance. The main macroeconomic and quantitative targets for FY2014/15 were:

- real economic growth of 1.4 per cent
- inflation rate of 8.5 per cent
- fiscal deficit of 0.7 per cent of GDP
- primary surplus of 7.5 per cent of GDP
- debt stock of 129.3 per cent of GDP.

In December 2014, Jamaica passed the sixth review under the IMF's EFF arrangement. This triggered the disbursement of SDR 45.95 million (approximately US\$66.8 million), which brought the total amount disbursed to SDR 360.49 billion (approximately US\$546.39 million). Policies and programmes, such as the Fiscal Rule (which was approved by Parliament in March 2014) were geared towards ensuring enhanced management and accountability of the fiscal accounts to support the fiscal consolidation process and create an improved environment for growth.

Central Government operations were budgeted to generate a fiscal deficit of \$11.4 billion compared with a \$1.8 billion

surplus in FY2013/14. Revenue & Grants were programmed at \$427.9 billion for FY2014/15, which was 7.7 per cent higher than the revised estimates for FY2013/14.

The Expenditure (excluding amortization) Budget for FY2014/15 was targeted at \$439.3 billion, a nominal increase of \$43.9 billion (11.1 per cent) compared with the revised estimates for FY2013/14. The projected non-debt expenditure for FY2014/15 was \$306.6 billion which represented a \$21.1 billion (7.4 per cent) increase compared with the revised estimates for FY2013/14. It should be noted that this budgeted increase in the non-debt expenditure (discretionary expenditure) was below the projected inflation, and represented a decline in non-debt expenditure in real terms. This increase was influenced primarily by a \$16.3 billion increase in expenditure on programmes. Debt servicing was projected at \$233.4 billion (up \$16.9 billion) and represented 43.2 per cent of the total budget, 0.1 percentage point higher than in FY2013/14.

Central Government's recurrent expenditure was projected to be \$404.7 billion, a 12.3 per cent increase vis-à-vis the revised estimates for FY2013/14. Interest payments were budgeted to increase by 20.7 per cent compared with the revised estimates for FY2013/14. Capital Expenditure (including Amortization) was projected at \$135.4 billion, which was \$6.4 billion lower than the revised estimates for FY2013/14. This decline reflected the shifting of recurring maintenance-type expenditures from capital expenditure to recurrent expenditure. Amortization payments were budgeted at \$100.8 billion, representing a decline of \$5.9 billion, while spending associated with capital programmes was targeted at \$34.6 billion, a decrease of \$0.5 billion relative to the revised estimates for FY2013/14.

Financing for FY2014/15 expenditure was expected to emanate from Revenue & Grants inflows of \$427.9 billion which was 7.7 per cent higher than the actual out-turn for FY2013/14. Loan receipts of \$110.9 billion in FY2014/15 was projected to be 17.6 per cent higher than the actual out-turn for FY2013/14. Tax Revenue was projected to contribute

1. Jamaica's macroeconomic programme supported by the EFF is evaluated quarterly through 11 quantitative performance criteria (nine of which are fiscal targets and two are monetary targets) and a number of structural benchmarks, in addition to other commitments made by the GoJ under the programme.
2. Special Drawing Rights – The SDR is an international reserve asset, created by the IMF in 1969 to supplement its member countries' official reserves. Its value is based on a basket of four key international currencies, and SDRs can be exchanged for freely usable currencies.

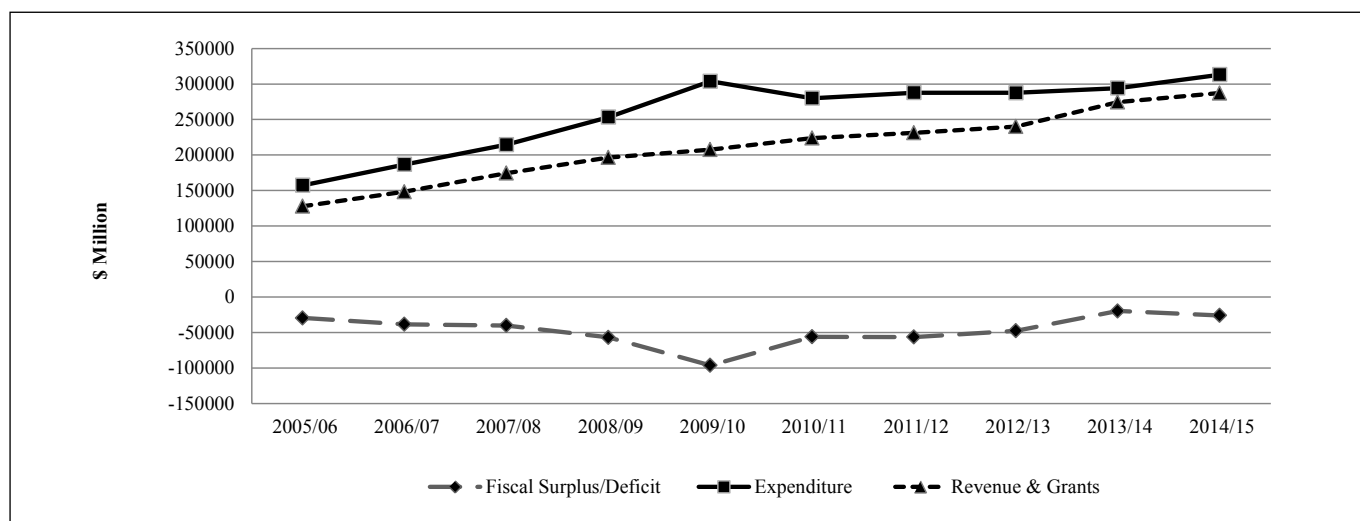


FIGURE 8A: EXPENDITURE (EXCLUDING AMORTIZATION), REVENUE & GRANTS AND FISCAL SURPLUS/DEFICIT FOR APRIL-DECEMBER 2005/06–2014/15

\$384.3 billion (89.8 per cent of total revenue and grants) and incorporated \$6.7 billion in new revenue measures to be implemented in FY2014/15 as part of the policy thrust geared towards fiscal consolidation.

For the period April–December 2014, Central Government operations generated a fiscal deficit of \$26.0 billion, which was \$7.9 billion less than budgeted (Figure 8a). This was the net result of Revenue & Grants of \$287.2 billion being \$9.9 billion lower than expected and Expenditure (less Amortization) of \$313.2 billion being \$17.7 billion less than programmed (Table 8.1a). The lower than programmed intake from Revenue & Grants was due mainly to shortfalls in Tax Revenue and Grants which were 3.6 per cent and 43.2 per cent less than programmed, respectively. The lower than expected Revenue & Grants can be partly explained by lower than projected economic growth, lower inflation and a larger than programmed decline in imports.

FISCAL POLICY AND PROGRAMMES

FISCAL POLICY

The Government of Jamaica remained focused on implementing its Economic Reform Programme (ERP). The primary objectives include the reduction of the public debt, macro-economic stability, improved productivity of the labour force and enhanced investor confidence as the steps necessary for sustainable economic growth. Consistent with these objectives are the nine Quantitative Performance Criteria (Box 8.1) and Structural Benchmarks, approved by the IMF in June 2014, that underpin the Extended Arrangement under the EFF with the IMF.

Selected Structural Benchmarks for FY2014/2015

- *Public Sector Investment Programme (PSIP)*: The tabling in Parliament of a comprehensive PSIP by April 30 2014. Consistent with the improved Public

BOX 8.1 QUANTITATIVE TARGETS (\$ BILLION)

	End-March
	2015
Primary surplus	122.0
Tax Revenue (floor)	384.0
Overall balance of the public sector (floor)	-7.5
Central government direct debt (ceiling)	35.3
Central Government guaranteed debt (ceiling)	-1.8
Central Government accumulation of domestic arrears (ceiling)	0.0
Central government accumulation of tax refund arrears (ceiling)	0.0
Consolidated government accumulation of external debt payment arrears (ceiling)	0.0
Social spending (floor)	21.7

Investment Management System (PIMS), crafted with World Bank support, a comprehensive PSIP was tabled, which provide a rolling five-year plan, comprising Cabinet approved investment projects, to be updated at regular intervals, which will be supported by a Public Investment Management Committee and the creation of a web-based Public Investment Management Information System. A PSIP policy paper will be produced annually to inform policy discussion.

- *Fiscal Rule*: A new fiscal rule to enhance fiscal transparency and lock in the gains of fiscal consolidation was passed by Parliament in March 2014. The relevant existing legislation (the Financial Administration and Audit (FAA) Act 1959 and the

Public Bodies Management and Accountability (PBMA) Act 2001) were amended to legislate the rule. The new fiscal policy framework limits the annual budgeted overall fiscal balance (starting in FY2017/18) of the specified public sector (excluding commercially-oriented public bodies) to achieve a reduction in public debt to no more than 60.0 per cent of GDP, excluding debt held by the Bank of Jamaica by the end of FY2025/26.

- *Tax Reform:* A major goal of the GoJ's strategy is to build an efficient and equitable tax system that will

contribute to the development of a stable macro-economy, while facilitating a competitive business environment to support economic growth. This system is also expected to ensure that the government's expenditure is adequately funded, hence reducing the fiscal deficit. Within this context, reforms and legislative changes were undertaken. These included:

- *Minimum Business Tax* – The minimum business tax is the sum of \$60 000 which is payable in respect of each year of assessment being the period of 12 months commencing on the 1st of

TABLE 8.1a
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, 2010/11–2014/15
(\$ Million)

	Apr-Dec 2010/11	Apr-Dec 2011/12	Apr-Dec 2012/13	Apr-Dec 2013/14 ^r	Apr-Dec 2014/15 ^p	Budget Apr-Dec 2014/2015	% Change FY 14/15 Budget
i Revenue & Grants	223 941.1	231 370.2	240 106.0	274 617.4	287 181.7	297 056.4	-3.3
Tax Revenue	196 355.7	206 269.9	224 840.7	242 651.2	258 610.9	268 316.5	-3.6
Non-Tax Revenue	16 571.4	12 127.5	12 259.1	22 264.7	23 585.3	21 329.7	10.6
Bauxite Levy	189.2	1 169.1	882.7	884.3	0.0	0.0	0.0
Capital Revenue	1 809.4	8 493.1	501.8	529.3	1 074.4	519.0	107.0
Grants	9 015.4	3 310.5	1 621.8	8 287.9	3 911.1	6 891.1	-43.2
ii Expenditure	279 916.7	287 740.1	287 618.4	294 235.1	313 195.2	330 926.1	-5.4
Recurrent Expenditure	239 793.8	251 917.9	265 101.0	270 252.8	294 907.6	304 371.8	-3.1
Programmes	55 017.3	63 292.5	66 038.0	69 160.9	81 189.2	81 860.4	-0.8
Wages & Salaries	96 480.9	105 680.4	112 787.3	119 786.8	120 879.1	122 641.7	-1.4
Interest	88 295.7	82 945.0	86 275.7	81 305.2	92 839.3	99 869.7	-7.0
Domestic	56 111.5	49 967.1	53 411.1	46 980.0	54 904.6	59 235.4	-7.3
External	32 184.2	32 977.9	32 864.6	34 325.2	37 934.6	40 634.4	-6.6
Capital Expenditure	40 122.9	35 822.2	22 517.4	23 982.3	18 287.6	26 554.3	-31.1
Capital Programmes	40 122.9	35 822.2	22 517.4	23 982.3	18 287.6	26 554.3	-31.1
iv Fiscal Balance (Surplus +/-/Deficit -) (i - ii) (Excludes Amortisation Payments)	-55 975.0	-56 369.0	-47 512.4	-19 615.7	-26 013.5	-33 869.8	-23.2
v Primary Surplus/Deficit (i - ii + iii)	32 320.1	26 575.1	38 763.4	61 689.5	66 825.8	66 000.0	1.3
vi Loan Receipts	140 102.1	112 165.4	102 809.9	54 555.2	139 211.3	83 493.1	66.7
External	49 506.7	18 593.0	6 594.4	36 704.2	113 670.6	47 748.2	138.1
Domestic	90 595.5	93 572.4	96 215.5	17 851.0	25 540.6	35 722.9	-28.5
vii Divestment							
viii Amortisation	73 147.7	80 437.2	68 528.5	35 487.0	71 404.0	64 303.8	11.0
External	16 623.5	52 241.6	42 633.9	22 294.7	52 208.2	48 895.6	6.8
Domestic	56 524.2	28 195.7	25 894.6	13 192.2	19 195.9	15 408.2	24.6
ix Overall Balance (Surplus +/-/Deficit -) - includes loan receipts and amortisation payments (iv + vi - viii)	11 629.2	-24 641.8	-13 231.0	-547.5	41 793.8	14 680.5	-384.7
Memo Items							
Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	-17 662.1	-29 040.8	-25 496.8	3 837.3	-8 800.3	-7 834.4	12.3
Debt Servicing (iii + viii)	161 443.4	163 382.2	154 804.2	116 792.1	164 243.3	164 173.5	0.0
External	48 807.7	85 219.5	75 498.5	56 619.9	90 142.8	89 530.0	0.7
Domestic	112 635.7	78 162.8	79 305.7	60 172.2	74 100.5	94 980.3	-22.0

p - preliminary

r - revised

Source: Ministry of Finance and Planning

January of each year. The tax is payable by any company registered under the Companies Act 2005, the Building Societies Act 1897, Friendly Societies Act 1968, Industrial and Provident Societies Act 1903.

- *General Consumption Tax Act 1991* – provision for the valuation and collection of tax on imported services.
- *Income Tax Act 1955* – withholding tax on insurance premiums.
- *Tax Collection (Miscellaneous Provisions) Act* – a new suite of collection/enforcement mechanisms.
- *Tax Penalties (Harmonization) Act* – modernization and harmonization of penalties across tax statutes.
- *Customs Act 1941* – provision for the introduction of ASYCUDA World.
- *Revenue Appeals Act* – establishment of the Revenue Appeals Department.

The Tax Administration of Jamaica (TAJ) also embarked on implementing activities aimed at improving voluntary tax compliance.

Pension Reform

Public sector pension reform represents an important element in attaining sustainability of the fiscal operations. During the review period, the following were achieved:

- Consultants were engaged to undertake project management and organizational development activities relating to re-engineering of the pensions administration process.
- Drafting instructions were submitted to the Chief Parliamentary Counsel in respect of the Omnibus Pension Legislation.
- Cabinet approval of the contract for the consultancy to develop an Application System for the Re-engineered Pension Administration (Earnings Database).
- Sensitization sessions on the reformed pensions system were held islandwide with stakeholders.

Debt Management Strategy

For FY2014/15, the main priorities outlined in the Medium-Term Debt Management Strategy FY2014/15–2016/17, focused on five main debt strategy guidelines:

- mitigating foreign exchange risk
- gradually increasing the proportion of fixed rate debt to floating rate debt

- maintaining or increasing the average maturity of the outstanding debt
- smoothing the maturity structure, with special emphasis on the domestic debt
- promoting the development of the domestic capital market.

The Debt Management Strategy is aimed at minimizing the cost of debt and the maintenance of a prudent debt structure consistent with the government's tolerance for financial risk. The Debt Management Strategy remains a key component of the Fiscal Responsibility Framework to ensure the long-term sustainability of the public debt.

PUBLIC BODIES

The group of 65 self-financing Public Bodies was estimated to generate current revenue of \$437.7 billion with a surplus of \$35.5 billion for FY2014/15. Given the estimates obtained as at December 2014, the group of Public Bodies is expected to exceed the targeted surplus of \$0.3 billion by \$3.0 billion. A shortfall of capital expenditure and a reduction in inventories will be the main contributors to the positive overall balance of the group.

FISCAL PROGRAMMES

Revenue & Grants

The Revenue & Grants projection for FY2014/15 of \$427.9 billion is expected to account for 26.5 per cent of GDP compared with \$397.0 billion (26.9 per cent of GDP) in FY2013/14. Tax revenue of \$384.3 billion, which was projected to account for approximately 89.8 per cent of total revenue, was budgeted to grow by 11.8 per cent relative to collections in FY2013/14 (Table 8.1b). This was supported by additional revenue measures of \$6.7 billion identified for implementation in FY2014/15. These included:

- modification of the alcohol tax regime to unify the Specific SCT on all alcoholic beverages
- increase in the age limit of second sale vehicles on which GCT will be applicable from eight to ten years
- increase in premium tax for regionalized and non-regionalized life assurance companies to 5.5 per cent
- increase in investment tax for insurance companies from 15.0 per cent to 20.0 per cent
- increase in the Asset Tax for the 2014 year of assessment
- modification of the duty regime for specified motor vehicles
- redirecting the portion of the SCT on petroleum that goes to the Road Maintenance Fund to Central Government.

Expenditure

For FY2014/15, the Central Government's budgeted Expenditure (less Amortization) was \$439.3 billion (27.2 per cent of GDP). This comprised \$306.6 billion for non-debt expenditure and current debt servicing (interest expense) of \$132.7 billion and represented increases of 7.4 per cent and 20.7 per cent, respectively, relative to the revised estimates for FY2013/14.

Interest payments of \$132.7 billion (8.1 per cent of GDP) represented an increase of 20.7 per cent compared with the previous year. Domestic and external interest payments were budgeted to increase by 18.2 per cent and 24.9 per

cent, respectively, compared with FY2013/14. The increase in the budget for domestic interest payments stemmed from higher interest rates, increased provision for guaranteed loans and the impact of the depreciation of the Jamaica dollar on loans pegged to the domestic currency. On the external side, increased loan receipts from multilateral agencies, the provision for a Liability Management exercise, along with the depreciation of the Jamaica dollar, contributed to the increase in the budgeted amount.

Budgeted spending on Capital Programmes of \$34.6 billion was \$0.5 billion less than the provisional expenditure of FY2013/14. This was due, in part, to the transfer of recurring maintenance, non-capital and one-off type expenditure to the

TABLE 8.1b
SUMMARY OF CENTRAL GOVERNMENT FISCAL OPERATIONS, 2010/11–2014/15
(\$ Million)

	2010/2011	2011/2012	2012/2013	2013/2014	Budget 2014/2015
i Revenue & Grants	314 588.5	322 457.3	344 677.7	396 979.3	427 888.6
Tax Revenue	279 874.2	289 882.2	319 764.9	343 836.1	384 286.0
Non-Tax Revenue	20 473.9	17 016.7	18 765.1	41 047.1	34 186.5
Bauxite Levy	421.1	1 524.5	1 163.7	1 009.5	17.9
Capital Revenue	3 664.5	10 585.1	1 015.8	658.1	753.3
Grants	10 124.8	3 448.8	3 968.3	10 428.5	8 644.9
ii Expenditure	388 768.0	403 191.6	399 278.9	395 241.7	439 282.7
Recurrent Expenditure	333 173.9	349 960.7	361 521.0	358 252.9	404 654.5
Programmes	76 862.5	89 699.4	87 201.5	91 971.7	110 281.1
Wages & Salaries	127 956.7	139 556.9	147 381.8	156 361.7	161 704.3
iii Interest	128 354.7	120 704.4	126 937.7	109 919.5	132 669.1
Domestic	88 049.5	81 617.3	87 729.1	68 728.9	81 242.6
External	40 305.2	39 087.1	39 208.6	41 190.6	51 426.5
Capital Expenditure	55 594.1	53 230.9	37 757.9	36 988.8	34 628.2
IMF #1 a/c	0.0	0.0	0.0	0.0	0.0
Capital Programmes	55 594.1	53 230.9	3 757.9	36 988.8	34 628.2
iv Fiscal Balance (Surplus + / Deficit -) (i - ii) (Excludes Amortisation Payments)	-74 209.5	-80 734.2	54 601.2	1 737.6	-11 394.1
v Primary Surplus/Deficit (i - ii + iii)	54 145.2	39 970.1	72 336.5	111 657.1	121 275.0
vi Loan Receipts	212 968.9	163 519.2	144 347.1	93 527.5	110 894.5
External	90 490.2	20 768.2	10 276.9	53 407.6	53 613.9
Domestic	122 478.7	142 751.1	134 070.2	40 119.9	56 280.6
vii Divestment	1 442.5	0.0	0.0	0.0	0.0
viii Amortisation	102 157.5	128 373.2	88 329.8	106 640.2	100 775.3
External	22 764.0	60 553.0	51 235.0	30 035.8	76 540.6
Domestic	79 393.5	67 820.3	37 094.8	76 604.4	24 234.7
ix Overall Balance (Surplus +/Deficit -) - includes loan receipts and amortisation payments (iv + vi - viii)	38 084.5	-45 588.3	-8 287.2	-11 375.1	-1 274.9
Memo Items					
Recurrent Surplus/Deficit (total revenue and grants excluding capital revenue minus recurrent expenditure)	-22 279.9	-38 088.5	-17 859.1	38 068.3	22 480.8
Debt Servicing (iii + viii)	230 512.2	249 077.6	215 267.5	216 559.7	233 444.4
External	63 069.2	59 855.3	90 443.6	71 226.4	127 967.1
Domestic	167 443.0	149 437.6	124 823.9	145 333.3	105 477.3

Source: Ministry of Finance and Planning

recurrent budget of the respective Ministries Departments & Agencies (MDAs).

Financing

Central Government's borrowing requirement for FY2014/15 was projected to total \$110.9 billion, 17.6 per cent higher than the previous fiscal year. This amount was required to finance the fiscal deficit of \$11.4 billion and cover amortization payments of \$100.8 billion. Of the budgeted loan receipts, \$56.3 billion was programmed to be raised from the domestic market and the remainder was to be raised from external sources in the form of policy based/development policy loans from international financial institutions, project loans and international capital market bonds.

FUNCTIONAL CLASSIFICATION OF EXPENDITURE

The total non-debt expenditure for FY2014/15 was budgeted at \$306.6 billion, 7.4 per cent higher than the revised estimates of \$285.6 billion for FY2013/14. Education, National Security and Health remained the main priority areas, collectively accounting for 32.2 per cent of the budget compared with the previous year's allocation of 36.0 per cent of the total budget (Figure 8B). These three services accounted for 58.5 per cent of non-debt expenditure. Education (recurrent and capital) was allocated \$82.3 billion, accounting for 14.8 per cent of the total budget compared with 16.9 per cent in FY2013/14 (Table 8.2).

Security Services was allocated \$57.8 billion, 10.4 per cent of the total budget compared with 11.1 per cent in FY2013/14. The recurrent allocations to the Security Services were:

- Police - \$33.6 billion
- Jamaica Defence Force - \$13.4 billion
- Justice - \$5.6 billion

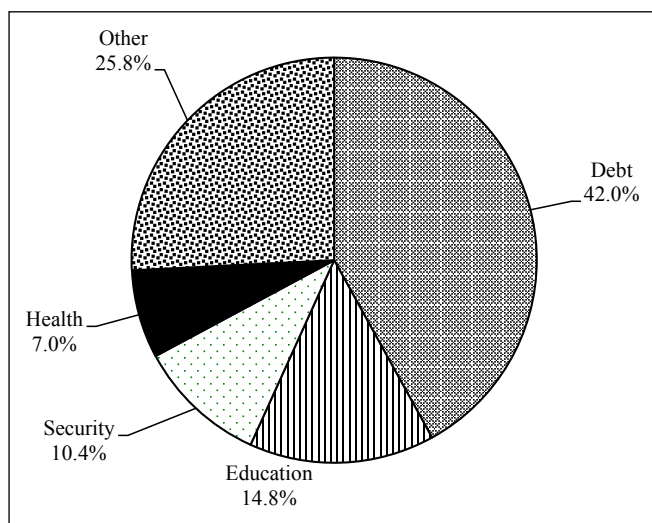


FIGURE 8B: BUDGETARY ALLOCATION FY2014/15

- Correctional Services - \$5.1 billion.

Health Services, which was programmed to receive \$39.2 billion, represented 7.0 per cent of the budget and 12.8 per cent of the non-debt budget.

FISCAL PERFORMANCE

Budget versus Actual Outcome

For April–December 2014, Central Government operations generated a fiscal deficit of \$26.0 billion which was lower than the budgeted fiscal deficit of \$33.9 billion. This out-turn was due to Revenue & Grants (\$287.2 billion) being 3.3 per cent lower than budgeted and Expenditure (excluding amortization) of \$313.2 billion, being 5.4 per cent less than programmed. Additionally, the primary surplus of \$66.8 billion was \$0.8 billion more than programmed. The shortfall in Revenue & Grants was due to lower than budgeted revenue from the subcategories Tax Revenue and Grants (see Table 8.1a). Tax revenue of \$258.6 billion was 3.6 per cent less than budgeted. This was due to a shortfall in revenue from the subcategories Income & Profits and Production & Consumption. The overall shortfall in revenue emanated from:

- higher than programmed decline in imports
- increased payment of refunds
- lower than programmed inflation
- lower than programmed economic growth
- less than budgeted tax compliance.

Income & Profits amounted to \$73.5 billion, which was \$3.4 billion or 4.4 per cent lower than budgeted. The shortfall was due mainly to lower than expected revenue from the following subcategories: Other Companies (\$6.6 billion less than budgeted); and Other Individuals (\$0.2 billion less than budgeted). The shortfall in revenue from Income & Profits was tempered by the higher than budgeted inflows from PAYE by \$2.0 billion and Tax on Interest by \$1.5 billion (Table 8.3a).

Tax revenue from Production & Consumption totalled \$87.1 billion, a shortfall of 7.1 per cent compared with budget. The lower than budgeted inflows was due mainly to shortfalls from the following tax types: Minimum Business Tax; SCT; Motor Vehicle Licence; Other Licences, Betting, Gaming and Lottery; Telephone Call Tax; Contractors Levy and GCT (Local) which had the largest absolute shortfall of \$5.4 billion or 10.6 per cent. The shortfall in GCT (Local) was due to lower than programmed nominal consumption, reflecting lower than expected inflation and lower real growth for the review period. Also contributing to the shortfall was higher refunds on GCT returns and lower than budgeted GCT revenue from government purchases.

Revenue from International Trade at \$96.3 billion was \$0.2 billion more than budgeted. This performance was

attributed largely to better than projected revenue inflows from SCT (imports) and Travel Tax by \$2.6 billion and \$0.3 billion, respectively. The higher SCT (imports) was largely attributable to a payment of \$1.1 billion received from the Jamaica Urban Transit Company (JUTC) related to the importation of buses and spare parts. These performances outweighed the shortfall in Stamp Duty; Custom Duty and GCT (Imports) which were lower than budgeted by 8.2 per cent, 6.1 per cent and 2.9 per cent, respectively. The shortfall in Stamp Duty; Custom Duty; and GCT (Imports) was due to lower than budgeted imports, lower duty rates (particularly

on motor vehicles causing a larger than expected narrowing of the tax base) and lower collections of GCT on government purchases. Revenue from Environmental Levy of \$1.8 billion was higher than the amount budgeted (\$1.7 billion).

Expenditure (excluding Amortization) for the period under review was \$313.2 billion, 5.4 per cent less than budgeted. This was due to lower than programmed Recurrent Expenditure and Capital Expenditure. Recurrent Expenditure of \$294.9 billion was 3.1 per cent less than budget, while Capital Expenditure at \$18.3 billion was less than the

TABLE 8.2
FUNCTIONAL CLASSIFICATION OF RECURRENT AND CAPITAL EXPENDITURE
FY2012/13–2014/15
\$ Million

	2012/13	2013/14	2014/15 ^P
A. GENERAL SERVICES			
1 General Administration			
Economic and Management	13 058.4	17 524.3	17 018.4
Foreign Affairs	2 848.9	3 082.9	3 212.0
Public Debt Management	325 890.8	214 689.3	233 444.5
Other General Public Services	40 236.8	39 616.7	39 854.7
Total General Administration	382 034.9	274 913.1	293 529.6
2 Public Order and Security Services			
Defence	12 312.0	13 061.5	13 376.3
Police	32 899.8	33 743.5	33 644.9
Justice	4 758.0	4 875.6	5 642.3
Correctional	4 999.7	5 211.1	5 131.9
Total Public Order and Security Services	54 969.4	56 891.7	57 795.3
TOTAL A - General Services	437 004.3	331 804.8	351 324.9
B. ECONOMIC SERVICES			
1 Industry and Commerce	2 017.8	2 109.7	2 148.6
2 Agriculture, Forestry and Fishing	9 963.2	9 563.9	9 286.0
3 Transport and Communication	21 343.6	17 744.5	19 722.9
4 Fuel and Energy	695.8	814.2	1 087.5
5 Environmental Protection and Conservation	2 123.0	1 998.8	1 824.9
6 Other Economic Services	5 655.4	6 119.3	6 261.0
TOTAL B - Economic Services	41 798.8	38 350.4	40 330.8
C. SOCIAL AND COMMUNITY SERVICES			
1 Education	82 080.3	86 857.3	82 382.1
2 Health	36 365.0	41 013.0	39 213.9
3 Housing	1 551.3	2 549.3	2 038.2
4 Recreation, Culture and Religion	4 622.4	3 429.6	3 621.7
5 Social Security and Welfare Services	7 285.3	8 713.5	9 509.7
6 Water Supply	1 611.9	1 196.2	757
7 Other Social and Community Services	4 408.1	4 834.0	5 973.4
TOTAL C - Social and Community Services	137 924.4	148 592.9	143 496.0
D. MISCELLANEOUS SERVICES			
1 Miscellaneous	0.0	0.0	0.0
2 Other Unallocatable Expenditure	1 012.3	1 023.4	21 270.8
TOTAL D - Miscellaneous Services	1 012.3	1 023.4	21 270.8
GROSS TOTAL	617 739.8	519 771.5	556 422.5
Less Appropriations-in-Aid	15 208.6	19 061.7	16 364.5
NET TOTAL	602 531.2	500 709.8	540 058.0

p - preliminary

Source: Ministry of Finance and Planning Financial Statement and Revenue Estimates 2014/15

programmed \$26.6 billion. The short-fall in Recurrent Expenditure reflected lower than budgeted expenditure on all subcategories: Programmes; Wages & Salaries; and Interest which had the largest absolute reduction in expenditure of \$7.0 billion. The recurrent expenditure on both Domestic and External Interest was less than budgeted by 7.3 per cent and 6.6 per cent, respectively. The lower spending during the review period resulted mainly from a combination of slower than planned execution of some investment projects; saving on interest; costs and lower than programmed recurrent demands from MDAs. Expenditure was also curtailed as a part of the GoJ's strategy to meet the primary surplus target, given the shortfall in Revenue & Grants.

Loan Receipts amounted to \$139.2 billion, which was 66.7 per cent more than budgeted. These loan receipts reflected

higher than budgeted external borrowings which outweighed the less than budgeted domestic borrowing. The higher external receipts was due primarily to an unprogrammed receipt of US\$140.0 million from the IMF for budgetary support and the over-subscription by US\$300.0 million to US\$800.0 million of an internationally floated bond in July. This bond is set to mature in 2025. The lower than budgeted domestic loan inflows stemmed from a better than programmed fiscal deficit, and higher than budgeted external receipts which reduced the domestic borrowing requirement.

Amortization payments of \$71.4 billion were 11.0 per cent higher than budgeted, as there was higher than anticipated payments of 24.6 per cent and 6.8 per cent for domestic amortization and external amortization, respectively. The higher domestic amortization was due to the shifting of a

TABLE 8.3a
TAX REVENUE COLLECTIONS, 2010/11–2014/15
\$Million

	Apr-Dec 2010/2011	Apr-Dec 2011/2012	Apr-Dec 2012/2013	Apr-Dec 2013/2014r	Apr-Dec 2014/2015	Budget Apr-Dec 2014/2015
TOTAL REVENUE & GRANTS	223 941.1	231 370.2	240 106.0	274 617.4	287 181.7	297 056.4
i) TAX REVENUE	196 355.7	206 269.9	224 840.7	242 651.2	258 610.9	268 316.5
Income and Profits	66 410.2	69 344.7	74 459.5	71 283.7	73 501.9	76 855.4
Bauxite/Alumina	866.3	0.1	0.0	0.0	0.0	0.0
Other Companies	16 656.7	16 033.1	19 702.7	18 443.7	15 280.1	21 849.4
PAYE	36 983.1	44 282.8	44 754.2	46 049.6	49 883.6	47 897.3
Tax on Dividend	727.5	723.0	996.8	1 027.8	1 244.0	1 286.7
Other Individuals	1 771.8	1 710.1	1 601.7	1 689.9	1 750.5	1 974.7
Tax on Interest	9 404.8	6 596.2	7 404.2	4 072.8	5 343.6	3 847.3
Environmental Levy	1,561.6	1 738.8	1 523.2	1 560.2	1 793.7	1 708.5
Production and Consumption	56 866.4	62 382.5	70 305.1	84 284.7	87 051.8	93 659.1
Minimum Business Tax	0.0	0.0	0.0	0.0	614.8	940.0
SCT	6 009.4	6 764.1	8 741.5	8 433.3	7 110.7	8 790.8
Motor Vehicle Licenses	1 329.4	1 294.7	1 599.5	1 908.6	1 979.3	1 945.6
Other Licenses	182.0	268.6	241.0	257.0	247.1	278.0
Betting, Gaming and Lottery	1 109.6	1 163.0	1 415.5	1 726.2	1 931.9	2 601.0
Accommodation Tax	0.0	0.0	265.2	1 290.9	1 473.6	1 333.3
Education Tax	9 361.1	10 963.4	10 870.0	13 080.7	14 194.2	13 676.4
Telephone and Telex	0.0	0.0	2 342.1	4 924.2	5 071.1	5 132.0
Contractors Levy	582.8	928.7	955.1	752.3	669.7	791.9
GCT(Local)	33 769.3	35 167.7	38 157.8	44 734.4	45 492.3	50 873.1
Stamp Duty(Local)	4 522.7	5 832.4	5 717.4	7 175.1	8 267.1	7 296.8
International Trade	71 517.6	72 804.3	78 552.8	85 524.6	96 263.5	96 093.5
Customs Duty	15 762.2	15 911.9	18 047.3	19 571.3	20 301.0	21 624.2
Stamp Duty	998.4	1 048.6	1 212.9	1 485.6	1 449.6	1 578.4
Travel Tax	2 838.1	4 158.5	3 835.1	6 969.6	7 126.1	6 809.7
GCT(Imports)	29 284.2	31 695.5	34 079.5	38 764.5	44 259.6	45 588.5
SCT (Imports)	22 634.7	19 989.8	21 378.0	18 733.6	23 127.3	20 492.7
ii) NON-TAX REVENUE	16 571.4	12 127.5	12 259.1	22 264.7	23 585.3	21 329.7
iii) BAUXITE LEVY	189.2	1 169.1	882.7	884.3	0.0	0.0
iv) CAPITAL REVENUE	1 809.4	8 493.1	501.8	529.3	1 074.4	519.0
v) GRANTS	9 015.4	3 310.5	1 621.8	8 287.9	3 911.1	6 891.1

r - revised

Source: Ministry of Finance and Planning

TABLE 8.3b
TAX REVENUE COLLECTIONS, 2010/11–2014/15
\$Million

	2010/ 2011	2011/ 2012	2012/2013	2013/2014	Budget 2014/2015
TOTAL REVENUE & GRANTS	314 558.5	322 457.3	344 677.7	396 979.4	427 888.6
i) TAX REVENUE	279 874.2	289 882.2	319 764.9	343 836.1	384 286.0
Income and Profits	105 118.7	106 422.9	115 877.1	112 647.7	123 446.7
Bauxite/Alumina	866.3	1.3	0.0	0.0	0.0
Other Companies	32 480.9	29 035.2	35 798	35 154.8	44 564.5
PAYE	51 552.6	60 164.8	60 876.3	62 810.7	64 111.7
Tax on Dividend	1 032.3	805.8	1 664.2	1 687.5	1 849.5
Other Individuals	4 001.8	3 786.6	4 022.4	4 162.3	4 667.0
Tax on Interest	15 184.9	12 629.2	13 516.2	8 832.4	8 254.0
Environmental Levy	2 040.1	2 318.8	2 122.1	2 084.2	2 333.5
Production and Consumption	78 571.4	84 629.0	96 459.9	115 212.3	130 025.9
Minimum Business Tax	0.0	0.0	0.0	0.0	1 200.0
SCT	8 647.9	9 238.2	12 457.3	12 313.8	12 805.3
Motor Vehicle Licenses	1 782.7	1 737.7	2 184.2	2 595.6	2 631.9
Other Licenses	265.5	377.9	342.9	360.5	395.1
Betting, Gaming and Lottery	1 532.8	1 640.8	1 915.0	2 455.7	3 691.4
Accommodation Tax	0.0	0.0	610.2	1 717.7	1 773.0
Education Tax	13 096.5	14 995.7	15 038.7	18 103.8	18 700.5
Telephone and Telex	0.0	0.0	3 822.5	6 539.8	7 057.8
Contractors Levy	793.6	1 171.1	1 293.4	991.5	1 087.1
GCT(Local)	46 389.9	47 973.2	50 897.1	61 265.1	70 963.7
Stamp Duty(Local)	6 062.4	7 494.4	7 898.6	8 868.9	9 720.1
International Trade	94 144.0	96 511.6	105 305.7	113 891.8	128 480.0
Customs Duty	20 487.7	20 769.0	24 413.7	25 559.3	28 463.3
Stamp Duty	1 393.2	1 470.3	1 672.2	1 945.5	2 130.4
Travel Tax	3 930.6	5 086.9	5 396.6	9 187.0	9 520.7
GCT(Imports)	38 520.6	41 684.8	45 501.2	51 237.5	60 091.9
SCT (Imports)	29 811.8	27 500.5	28 322.0	25 962.5	28 273.6
ii) NON-TAX REVENUE	20 473.9	17 016.7	18 765.1	41 047.1	34 186.5
iii) BAUXITE LEVY	421.1	1 524.5	1 163.7	1 009.5	17.9
iv) CAPITAL REVENUE	3 664.5	10 585.1	1 015.8	658.1	753.3
v) GRANTS	10 124.8	3 448.8	3 968.3	10 428.5	8 644.9

Source: Ministry of Finance and Planning

payment from interest to principal for a maturing instrument held by the Bank of Jamaica as well as additional requirements to execute a liability management exercise.

Actual Outcome April – December 2014 versus Actual Outcome April – December 2013

The fiscal deficit for April–December 2014 of \$26.0 billion was 32.6 per cent worse than the fiscal deficit for the corresponding period of 2013 (Table 8.1a). This was due to a 6.4 per cent increase in Expenditure (excluding Amortization), which outweighed the 4.6 per cent increase in Revenue & Grants. The primary surplus for the review period was \$66.8 billion, which was 8.3 per cent higher than the

similar period of 2013, demonstrating the results of continued fiscal consolidation efforts.

Within Revenue & Grants, Tax Revenue, Non-tax Revenue and Capital Revenue recorded increases compared with the corresponding period of 2013. These increases outweighed the decreases in Bauxite Levy and Grants. Tax Revenue increased by 6.6 per cent, with all categories contributing: Income & Profits (up 3.1 per cent); Environmental Levy (up 15.0 per cent); Production & Consumption (up 3.3 per cent); and International Trade (up 12.6 per cent).

Taxes from the subcategory Income & Profits increased by \$2.2 billion relative to the similar period of 2013. This was

attributed mainly to higher collections from PAYE by 8.3 per cent; Tax on Dividend by 21.0 per cent; Other Individuals by 3.6 per cent; and Tax on Interest 31.2 per cent. This offset the decline of 17.2 per cent in Other Companies. The improved performance by PAYE was due to increased compliance partly due to the amalgamation of statutory deduction forms, while the improvement in Tax on Interest was due to payments for withholding tax on insurance companies being included in the subcategory (Tax on Interest) instead of Other Companies.

Production & Consumption increased relative to the similar period of 2013 and was due mainly to increases in all subcategories, except: SCT (down 15.7 per cent); Other Licenses (down 3.8 per cent); and Contractors Levy (down 11.0 per cent).

Total Expenditure for April–December 2014 amounted to \$313.2 billion, which was \$19.0 billion higher than the amount spent in April–December 2013. This higher total expenditure was due to increases in Recurrent Expenditure by 9.1 per cent which outweighed the decline in Capital Expenditure by 23.7 per cent. Within the recurrent category, an increase was registered for all subcategories: Programmes which rose by \$12.0 billion; Interest by \$11.5 billion; and Wages & Salaries by \$1.1 billion. The increase in Recurrent Expenditure can be partly explained by a \$2.5 billion provision to the JUTC, payment of GCT by MDAs and the transfer of activities to recurrent expenditure previously classified as capital expenditure.

Financing

Loan Receipts for the period under review was \$139.2 billion, \$84.7 billion higher than the similar period of 2013. This out-turn was attributed to an increase in loans received from both external and domestic sources. Domestic loan receipts increased by \$7.7 billion and external loan receipts (excluding investment loans) by \$77.0 billion.

Amortization payments (\$71.4 billion) were \$35.9 billion higher than the amount for the corresponding period of 2013. This out-turn denoted the higher payments for Domestic Amortization (up from \$13.2 billion to \$19.2 billion) and External Amortization (up from \$22.3 billion to \$52.2 billion), which was due mainly to a maturing Euro bond as well as exchange rate depreciation.

Debt Stock

The total stock of debt at the end of December 2014 amounted to \$2 039 650.8 million, 5.2 per cent more than at the end of December 2013. The increase in the stock figure was due to an increase of 12.3 per cent in the external component, which outweighed a 0.7 per cent decline in the domestic component of the debt. The debt stock was disaggregated as follows: Domestic (\$1 046 850.3 million) and External (\$992 800.5 million).

The lower domestic debt was due mainly to declines in both the JDX Fixed Rate and Variable Notes by 3.5 per cent to

\$13.0 billion and 60.1 per cent to \$27.8 million, respectively. There was also a decline in the USD Notes from \$45.0 billion to \$0.4 billion. Also contributing to the decline in the domestic debt was a decrease in NDX Fixed Rate Notes (down 1.9 per cent to \$405.5 billion) which outweighed increases in:

- CPI Notes – up 7.5 per cent to \$42.9 billion
- USD Notes – up 4.2 per cent to \$73.6 billion.

Extended Fund Facility (EFF) Update

Central Government operations met the end of December 2014 targets. The primary balance of \$66.8 billion was \$0.8 billion above the target, while tax revenue of \$258.6 billion was \$1.4 billion less than the indicative target. The overall balance of the public sector was a deficit of \$17.0 billion, which also met the end of December 2014 target. The accumulation in Central Government direct debt target of \$92.4 billion and the guaranteed debt target of \$0.1 billion were met. With respect to the floor on Social Spending and performance criteria for no increase in External Debt Payment Arrears, Tax Refund Arrears and Domestic Arrears, these targets were also met at end-December 2014. The macroeconomic performance under the programme continues to be good and growth is showing positive signs. Further actions are needed and will be taken to strengthen public financial management and the soundness of the financial system.

Supplementary Budget

A requirement under the Fiscal Responsibility Framework (Financial Administration and Audit Act) is for the government to table a supplementary budget reflecting any changes in operations and seek parliamentary approval. As a result of the above-mentioned deviation in the Central Government operations for FY2014/15, considerable focus on both revenue and expenditure measures is required to bring the fiscal accounts back on track with the legislated targets and continued positive reviews from the IMF.

The Supplementary Estimates reflect that the primary surplus for FY2014/15 is estimated at 7.7 per cent of GDP (\$121.3 billion), which is 0.2 percentage point higher than initially programmed. The GoJ continues to closely monitor the fiscal situation and has identified expenditure containment measures to ensure that the primary surplus target (floor) of 7.5 per cent of GDP target is achieved. The fiscal deficit is now estimated at \$10.3 billion compared with the original projection of \$11.4 billion, an improvement of \$1.1 billion.

Revenue & Grants for FY2014/15 are currently estimated to be \$1.7 billion below budget at \$426.1 billion, with tax revenue projected at \$380.7 billion, a shortfall of \$3.6 billion against budget. This estimate for Revenue & Grants is 7.3 per cent above the previous fiscal year. Tax revenue is projected to increase by 10.7 per cent relative to collections in FY2013/14. The increase in Revenue & Grants is the main contributor to the improvement in the primary surplus relative to FY2013/14.

Central Government expenditure (excluding amortization) for FY2014/15 was revised to \$436.5 billion, which is 0.6 per cent less than the original budget. This reduction is due largely to a \$3.8 billion decline in expenditure on Capital Programmes to \$30.9 billion compared with the \$34.6 billion originally budgeted for FY2014/15. Interest payments of \$131.6 billion are \$1.1 billion below budget, while the category Wages & Salaries was \$1.9 billion below the initial budget.

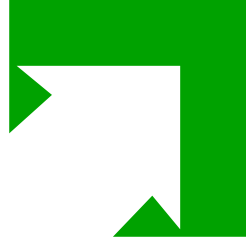
OUTLOOK

Central Government operations are expected to generate a fiscal deficit of \$7.5 billion at the end of March 2015. This is predicated on Revenue & Grants of \$417.8 billion and Expenditure (less amortization) of \$425.3 billion. The estimated Revenue & Grants is a shortfall of \$10.1 billion compared with budget, while Expenditure (less amortization) is \$14.0 billion less than budgeted.

The shortfall in Revenue & Grants component can be attributed to a shortfall in the category Tax Revenue due to less than budgeted revenue in the subcategories GCT (Local); Other Companies; GCT (Imports); and Customs Duty. Grants are expected to be less than targeted due mainly to delayed budget support disbursements and slower execution of capital projects.

The GoJ is expected to successfully complete the seventh review under the EFF which will enable a drawdown of SDR 28.32 million (approximately \$39.0 million). The GoJ will continue its fiscal consolidation programme in 2015, which will be supported by work on the structural benchmarks under the EFF. These include:

- *Tax reform*: Conduct an entity by entity review of all grandfathered entities and of their specific tax incentives in the context of the new tax incentives legislation.
- *Tax Administration*:
 - implement Phase 1 of the GENTAX integrated tax software package
 - increase the number of staff by a further 50 auditors
 - increase the number of audits completed in the large taxpayers offices by 100.0 per cent
 - achieve 95.0 per cent take up rate of e-filing and e-payment. ■



FINANCE & INSURANCE SERVICES INDUSTRY

INTRODUCTION

Real value added for the Finance & Insurance Services industry increased by 0.2 per cent compared with 2013 (Figure 9A), representing the third consecutive yearly growth. This improved performance was due mainly to an increase in Total Assets at deposit-taking institutions, more revenue earned from fees and commission, an increase in earnings at general insurance companies, and a rise in returns earned from investments.

The interest rate on the Bank of Jamaica’s benchmark 30-day Certificate of Deposit (CD)¹ was held at 5.75 per cent in 2014. The rate remained unchanged as inflation fell within the Central Bank’s targeted range. However, reduced demand for credit led to a moderate downward movement in interest rates.

There was a rise in income for Commercial Banks which was spurred by a real increase in Foreign Assets. The implications of the National Debt Exchange (NDX)² Programme encouraged banks to earn more revenue through greater asset yields. In particular, the depreciation of the Jamaican dollar vis-à-vis other

major currencies made the acquisition of Foreign Assets more lucrative.

The profitability of general insurance companies also contributed to the growth of the industry. Performance was driven by higher premiums and an increase in the amount of funds managed on behalf of investors. Subsequently, net investment income and net premium income both increased.

The advancement of the Finance & Insurance Services industry was, however, stymied by the continued impact of the NDX as companies earned less on their security investments. Commercial banks were affected by the real decline in the stock of loans & advances which directly impacted net interest income. Moreover, the Jamaica Stock Exchange (JSE) main market declined by 5.3 per cent.

PERFORMANCE

The Bank of Jamaica

Total assets at the BOJ amounted to \$510.3 billion which represented an increase of 43.7 per cent relative to the end of

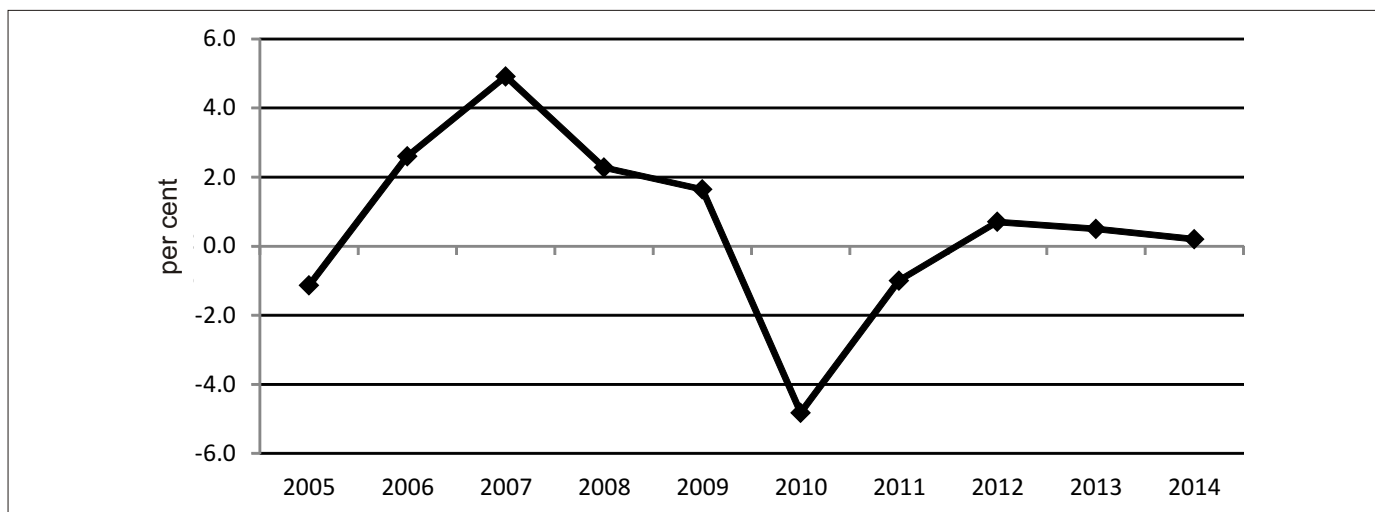


FIGURE 9A: REAL VALUE ADDED GROWTH RATE FOR FINANCE & INSURANCE SERVICES, 2005–2014

1 The rate was lowered by 0.5 percentage point to 5.75 per cent in February 2013.
 2 The NDX, which was launched in February 2013, is an exchange initiative that targeted \$860.0 billion of debt issued in the domestic market.

TABLE 9.1
LEGISLATIVE AND POLICY DEVELOPMENTS

Act/ Legislation	Purpose	Status
Private Pensions Legislation	To address important issues such as vesting, portability and indexation.	A cabinet submission with regard to the second phase of private sector pension reform was finalized for approval
Insurance (Amendment) Act	To provide for the harmonization of certain provisions with other financial sector legislation and the strengthening of a legislative framework for the insurance industry	The bill is expected to be passed by the end of March 2015
Bank of Jamaica (Amendment) Act	To give the Bank of Jamaica greater institutional responsibility to ensure stability of the financial system	The Act is currently being revised by the Chief Parliamentary Counsel (CPC) to incorporate the most recent feedback of stakeholders. The subsequent step is for the Act to be submitted to the Legislation Committee once it is finalised
Banking Services Act	To merge the Banking Act, Financial Institutions Act as well as some provisions of the Building Societies Act and the Bank of Jamaica (Building Societies) regulations into one piece of legislation	Passed in the Houses of Parliament in June 2014 and assented by the Governor General in July 2014
Securities Act	To improve the legal and regulatory framework for Retail Repurchase Agreements (Retail Repos)	The Bill was tabled and passed in the Houses of Parliament in December 2014
Financial Investigation Division (FID)	To allow the FID to share information with its international counterparts. This demonstrates the commitment of the standards and strength of Jamaica's legal and institutional framework in the fight against money laundering and terrorism financing in the international community	Recent amendments were passed

Source: Compiled by the PIOJ from multiple sources

previous year (Table 9.2). The growth in asset base reflected increases in the amount invested in Foreign Assets (up 50.0 per cent to \$288.0 billion) and Local Assets (up 36.3 per cent to \$222.3 billion). Closer examination of the Foreign Assets category revealed that Time Deposits & Other Cash Resources increased by 92.6 per cent to \$230.7 billion while Bonds & Other Long Term Securities decreased by 35.2 per cent to \$26.5 billion. Within the Local Assets category, the expansion was due to increases in Holdings of GOJ Securities (up 22.3 per cent to \$122.6 billion), Advances and Other GOJ Receivables (up 4.8 per cent to \$26.9 billion), Advances to Financial Institutions (up 370.6 per cent to \$43.6 billion) and Other Assets (up 4.9 per cent to \$29.1 billion). The rise in Total Liabilities, Capital & Reserves (up 43.7 per cent to \$510.3 billion) reflected an increase in Demand Liabilities (up 18.8 per cent to \$281.2 billion), Other Liabilities (up 99.0 per cent to \$220.2 billion) and Capital & Reserves (up 15.2 per cent to \$8.8 billion).

Jamaica Deposit Insurance Corporation (JDIC)

Under the Deposit Insurance Scheme (DIS), the number of Policy Holders that received insurance coverage was 11 relative to 12 in the previous year. This was a result of the acquisition of RBC Royal Bank Jamaica Limited by Sagicor Group Limited and the amalgamation of the businesses. Policyholders comprised six commercial banks, two merchant

banks, and three building societies. The coverage limit remained unchanged at \$600 000 per depositor, per insured institution. At this limit, the take-up rate for accounts that can be fully covered under the DIS was approximately 96.8 per cent, which is consistent with the international trend of covering the majority of retail depositors (upwards of 90.0-95.0 per cent). Additionally, the premium assessment rate remained at 0.15 per cent.

The Deposit Insurance Fund (DIF) increased by 18.2 per cent to \$11.7 billion compared with the end of 2013. The rise in the DIF was spurred by investment and premium incomes over the period. Net Investment Income and Premium Income grew by 13.2 per cent to \$1.1 billion and 5.9 per cent to \$854.9 million, respectively. Notably, there were no reported failures in the banking system.

Deposit-Taking Institutions

The Central Bank regulated 11 deposit-taking institutions, 1 less than in 2013 (Table 9.3). At authorized deposit taking institutions, Total Assets³ amounted to \$1 084.4 billion, 10.9 per cent more than at the end of 2013 (Table 9.4). A rise in total deposits (up 6.9 per cent to \$683.8 billion) and loans (up 6.6 per cent to 497.4 billion) contributed to the increase in profits from fees and commission.

3 The Assets figures in Table 9.3 are net of provisions and therefore include guarantees, and exclude securities purchased with a view to resale.

TABLE 9.2
ASSETS AND LIABILITIES OF THE BANK OF JAMAICA AT DECEMBER 2013-2014
(JS '000)

	2013	2014	% Change
Foreign Assets	192 041 420	288 005 736	50.0
Bonds & Other Long Term Securities	40 940 332	26 513 567	-35.2
Time Deposits & Other Cash Resources	119 801 538	230 731 863	92.6
IMF-Holding of Special Drawing Rights	31 299 550	30 760 306	-1.7
Local Assets	163 026 382	222 262 691	36.3
Government Obligations:			
Holdings of GOJ Securities	100 316 388	122 637 340	22.3
Advances and Other GOJ Receivables	25 659 409	26 882 538	4.8
Advances to Financial Institutions	9 264 840	43 596 017	370.6
Items in The Process of Collection	0	0	-
Other Assets	27 785 745	29 146 796	4.9
TOTAL ASSETS	355 067 802	510 268 427	43.7
Demand Liabilities	236 742 034	281 241 786	18.8
Notes & Coins in Circulation	71 838 839	78 725 443	9.6
Deposits			
Public Sector	24 903 271	73 643 536	195.7
IMF(GOJ)	73 233 238	52 907 663	-27.8
Commercial Banks and Other LFIs	65 030 542	73 996 093	13.8
Other	1 736 144	1 969 051	13.4
Other Liabilities	110 700 490	220 245 140	99.0
International Monetary Fund			
Allocation of Special Drawing Rights	42 592 786	43 315 547	1.7
Foreign Liabilities	191 232	365 876	91.3
Open Market Instruments	59 115 274	173 177 279	192.9
Amounts Due to Government of Jamaica	0	437 761	-
Other Liabilities	8 801 198	2 948 677	-66.5
Total Capital & Reserves	7 625 278	8 781 501	15.2
TOTAL LIABILITIES, CAPITAL & RESERVES	355 067 802	510 268 427	43.7

Source: Bank of Jamaica

NPLs as a share of Total Loans decreased by 0.5 percentage point to 4.9 per cent (Figure 9B). This reflected a decrease in ratios for Commercial Banks (down by 0.3 percentage point to 4.9 per cent), FIA Institutions (down by 0.7 percentage point to 1.0 per cent) and Building Societies (down by 1.1 percentage points to 5.3 per cent).

Better management of credit quality as well as decisions made to write off of bad loans resulted in a decline in non-performing loans (NPLs), down 2.2 per cent to \$24.5 billion. The improved credit quality was due to a reduction in the number of delinquent loans at FIA institutions (down 21.7 per cent to \$0.1 billion) and Building Societies (down 9.0 per

TABLE 9.3
INSTITUTIONS IN THE JAMAICAN FINANCIAL SYSTEM, 2010-2014

Institutions	2010	2011	2012	2013	2014
Deposit-Taking Institutions:					
Commercial Banks	7	7	7	7	6
FIA Institutions	2	2	2	2	2
Building Societies	4	4	4	3	3
Credit Unions ^a	44	42	41	38	37
Non-Deposit -Taking Institutions:					
Insurance Companies	15	16	17	15	15
Developmental Banks	4	4	4	4	4
Securities Dealers	47	47	48	48	48

a - Credit Unions are not supervised by the BOJ

Source: Compiled by the Planning Institute of Jamaica

TABLE 9.4
SELECT KEY INDICATORS OF DEPOSIT-TAKING INSTITUTIONS PERFORMANCE, 2010-2014

	Dec 2010	Dec 2011	Dec 2012	Dec 2013	Dec 2014
Real GDP - Financial Sector (\$million)	78 400.4	78 755.2	79 287.1	82 140	82 063.3
Percentage Contribution to Real GDP	10.8	10.8	10.9	11.2	11.2
Growth Rate (%)	-4.8	0.5	0.7	0.5	0.2
Average Employment	24 300	25 233	25 875	26 000	26 050
Total Assets (\$million)	782 640	820 558	882 774	977 894	1 084 350
Total Deposits (\$million)	503 346	528 461	584 085	639 943	683 820
Total Loans (\$million)	345 832	362 268	408 982	466 586	497 398
Capital Base (\$million)	84 688	89 291	93 066	110 234	117 515
Non- Performing Loans[NPLs] (3 months &>) (\$million)	22 365	32 202	28 723	25 015	24 469
NPLs:Total Loans (%)	6.5	8.9	7	5.4	4.9
Capital Base:Total Asses(%)	10.8	10.9	10.5	11.3	10.8
NPLs:Capital Base+Provisions (%)	22.3	28.4	24.1	18.6	17.1
Pre Tax Profit Margin (%)	21.1	30.8	21.4	19	18.9

r-revised

Source: Planning Institute of Jamaica and Bank of Jamaica

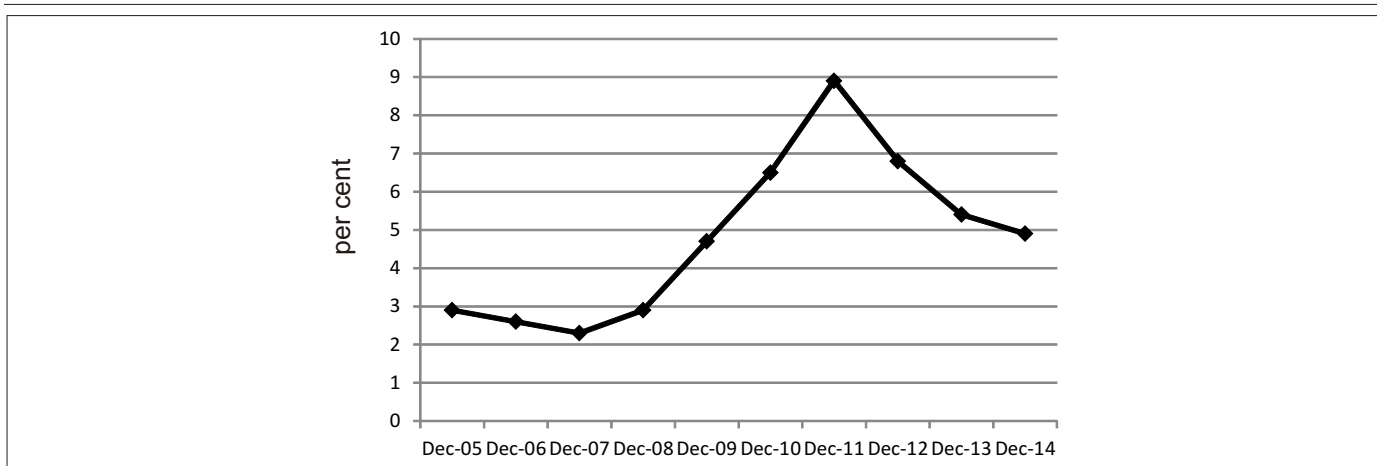


FIGURE 9B: NON-PERFORMING LOANS TO TOTAL LOANS RATIO (SYSTEM TOTAL), 2005-2014

cent to \$5.7 billion) which outweighed the increase in bad loans recorded for Commercial Banks (up 21.4 per cent to \$18.7 billion).

Commercial Banks

Total assets at commercial banks amounted to \$818.6 billion, denoting a nominal increase of 11.4 per cent (Table 9.5). This out-turn translated into a real increase of 4.7 per cent compared with the end of 2013. The expansion was due mainly to real growth in the amount held in Foreign Assets, and higher revenue earned from fees and commission income.

Banks have effectively altered their operations to remain profitable, notwithstanding the setbacks suffered from the implementation of the NDX. Consequently, greater investment in foreign assets has more than offset the losses incurred due to lower coupon rates on domestic debt. Although there has been an increase in ownership of local assets, the depreciation of the Jamaican currency has made acquisition of foreign assets more beneficial, in terms of yielding higher returns.

A real increase in earnings from fees and commission income also contributed to the rise in profitability. There have been increased fees for services offered and despite the efforts made by Banks to encourage more online banking, the majority of consumers still utilize in bank services which incurs charges.

At the end of 2014, the stock of Loans & Advances at commercial banks was \$381.0 billion relative to \$362.1 billion at the end of 2013 (Table 9.6). Although the stock increased in nominal terms, it decreased in real terms. The contraction, in real terms, reflected a decline in the Goods Producing (down 1.0 per cent) and Services industries (down 2.4 per cent) as loans for Consumption purposes increased by 0.1 per cent. Loans & Advances outstanding accounted for 46.5 per cent of Total Assets, 2.8 percentage points less than at the end of 2013 (see Table 9.4). Notably, credit to the private sector as a share of total credit has trended upwards over the last five years, from 88.0 per cent in 2010 to 92.5 per cent in 2014. Although there has been an upward trend, loans disbursed to businesses for investments have declined as the increase has been spurred by loans to individuals for household consumption. The ratio of Private Credit (Excluding Loans to Consumer) to Total loans fell from 50.4 per cent in 2010 to 45.7 per cent in 2014.

At the end of 2014, the stock of Loans & Advances to the Goods Producing industry totalled \$46.6 billion, 5.3 per cent more than at the end of 2013 (see Table 9.6). This amount translated into a real decline of 1.0 per cent. This contraction was attributed to real decreases in Mining (down 8.3 per cent), Manufacturing (down 5.5 per cent) and Construction & Land Development (down 1.3 per cent).

TABLE 9.5
ASSETS OF COMMERCIAL BANKS, DECEMBER 2010-DECEMBER 2014

	Dec 2010	Dec 2011	STOCK OF ASSETS (\$ Million)			% Change 2014/13	Real % Change 2014/13
			Dec 2012	Dec 2013	Dec 2014		
Cash	8 234	9 792.9	9 949.5	11 160.4	11 353.6	1.7	-4.3
Balances with BOJ	97 328.7	81 915.3	68 022.2	64 953.4	70 490.4	8.5	2.0
Foreign Assets	115 821.6	115 335.1	126 043.6	153 521.2	201 764.3	31.4	23.6
Loans & Advances Outstanding	251 340.6	266 044.2	307 477.9	362 116.9	380 970.3	5.2	-1.1
Private Sector	221 202.4	243 206.9	282 168.8	334 081.3	352 399.2	5.5	-0.8
Public Sector	30 138.3	22 837.3	25 309.1	28 035.6	28 571.1	1.9	-4.2
Treasury Bills	486.3	847.8	198.8	311.1	98.5	-68.3	-70.2
L.R.S.	0.0	0	0	0.0	0	0	-
Other Securities	68 913.7	81 681.9	88 619.4	83 050.7	83 417.0	0.4	-5.6
Cheques in the course of Collection	3 340.6	2 476.2	2 065.8	2 345.4	3 297.5	40.6	32.2
Other Assets	40 462.3	50 298.9	54 075.5	57 537.3	67 193.7	16.8	9.8
Total	585 927.8	608 392.2	656 452.6	734 996.3	818 585.3	11.4	4.7

Source: Bank of Jamaica

Year-end data for 2014 revealed that the stock of Loans & Advances to the Services industry amounted to \$156.2 billion compared with \$150.4 billion at the end of 2013. In real terms, this represented a 2.4 per cent decline. The fall off was ascribed to real decreases in four of the eight categories, namely: Transport, Storage & Communication (down 11.6 per cent); Electricity, Gas & Water (down 32.3 per cent); Government Services (down 4.2 per cent); and Entertainment (down 2.1 per cent)

The stock of Loans & Advances for consumption purposes was \$178.1 billion, up 6.4 per cent in nominal terms and up 0.1 per cent in real terms. The out-turn was stimulated by the overall downward movement in borrowing rates.

Financial Institutions Act (FIA) -Licensees

Total Assets at FIA licensees amounted to \$31.0 billion. This out-turn denoted a nominal increase of 22.3 per cent and a real increase of 14.9 per cent year-over-year (Table 9.7). The rise in total assets resulted from real growth in all categories:

- Cash & Deposits with Banks & Other Institutions (up 36.0 per cent)
- Foreign Assets (up 1.4 per cent)
- Loans & Advances (up 22.7 per cent)
- Jamaican Government Securities (23.7 per cent)
- Other Assets (up 60.8 per cent).

The stock of Loans & Advances at the end of 2014 amounted to \$9.3 billion, a real increase of 23.4 per cent (Table 9.8). The augmented loan portfolio was ascribed to real increases in the stock outstanding to the Goods Producing (up 28.4 per cent) and Services Industries (up 20.0 per cent) as well as for consumption purposes (up 24.9 per cent). The growth in credit to the Goods Producing industry was due to a rise in loans

allocated for all the components, except Manufacturing which declined by 0.4 per cent in real terms. Within the services industry, the expansion was driven by a real increase in Distribution (up 20.6 per cent); Tourism (up 21.9 per cent); Financial Institutions (up 111.6 per cent); and Professional & Other Services (up 20.7 per cent).

Building Societies

For the year ending 2014, data revealed that total assets for Building societies amounted to \$232.3 billion. This represented a nominal increase of 9.2 per cent and a real increase of 2.7 per cent compared with the end of 2013 (Table 9.9). The growth, in real terms, reflected increases in the stock of Loans & Advances (up 3.5 per cent), Foreign Assets (up 14.1 per cent) and Other Assets (up 23.8 per cent). The rise in the loans portfolio, which accounted for 46.1 per cent of Total Assets, was due partly to the growth recorded for the construction industry. Of note, there was a real decline (19.1 per cent) in the amount held in Government Securities which continued to be impacted by the NDX programme as well as fiscal consolidation initiatives.

Credit Unions

At the end of 2014, there were 37 credit unions relative to 38 at the end of the previous year⁴. Preliminary data revealed that the asset base amounted to \$82.1 billion, up 7.0 per cent in nominal terms and up 0.6 per cent in real terms. The growth continued to be influenced by the rise in membership (up 1.7 per cent to 989 000), and an increase in loans (up 6.1 per cent to \$55.7 billion). In addition, savings at the credit unions was \$62.7 billion, an increase of 6.4 per cent year-to-date.

Interest Rates

The average commercial banks' overall weighted average monthly loan rates was 17.22 per cent, down 0.5 percentage

TABLE 9.6
COMMERCIAL BANKS LOANS AND ADVANCES 2010 - 2014
(\$'000)

	2010	2011	2012	2013	2014	%Change 2014/2013	Real Percentage Change			
							2011/2010	2012/2011	2013/2012	2014/2013
GOODS PRODUCING	35 204 562	32 220 404	40 009 707	44 308 156	46 640 260	5.3	-13.7	15.0	1.2	-1.0
AGRICULTURE	4 519 525	5 366 124	6 138 237	7 733 771	8 861 170	14.6	12.0	5.9	15.1	7.7
(1) Production	4 352 404	4 847 285	5 138 694	6 306 724	7 356 718	16.6	5.1	-1.9	12.1	9.7
(2) Marketing	165 005	490 659	782 907	1 248 785	1 074 894	-13.9	180.5	47.7	45.7	-19.1
(3) Land Acquisition	2 116	28 180	216 636	178 262	429 558	141.0	1156.3	611.7	-24.8	126.6
MINING	426 384	595 074	692 970	747 665	729 017	-2.5	31.7	7.8	-1.4	-8.3
MANUFACTURING	8 296 100	7 771 294	12 063 051	12 608 843	12 678 962	0.6	-11.6	43.7	-4.5	-5.5
(1) Sugar, Rum & Molasses	112 238	233 324	1 871 640	752 464	354 010	-53.0	96.1	642.6	-63.3	-55.8
(2) Food, Drink & Tobacco	1 912 513	1 954 979	4 333 708	5 380 108	5 991 986	11.4	-3.6	105.2	13.4	4.7
(3) Paper, Printing & Publishing	128 022	116 819	168 266	267 076	346 355	29.7	-13.9	33.3	45.0	21.9
(4) Textile, Leather and Footwear	134 235	166 996	201 571	192 755	164 833	-14.5	17.4	11.7	-12.6	-19.6
(5) Furniture, Fixtures & Wood Products	648 167	647 682	474 405	529 578	642 190	21.3	-5.7	-32.2	2.0	14.0
(6) Metal Products	379 154	237 634	228 327	214 530	151 231	-29.5	-40.9	-11.1	-14.2	-33.7
(7) Cement & Clay Products	1 087 646	981 037	884 134	941 606	593 449	-37.0	-14.9	-16.6	-2.7	-40.7
(8) Chemicals & Chemical Products	648 803	374 787	819 764	647 356	577 259	-10.8	-45.5	102.5	-27.9	-16.2
(9) Other	3 245 322	3 058 036	3 081 236	3 683 370	3 857 649	4.7	-11.1	-6.7	9.2	-1.5
CONSTRUCTION & LAND DEVELOPMENT	21 962 553	18 487 912	21 115 449	23 217 877	24 371 111	5.0	-20.6	5.7	0.4	-1.3
(1) Construction	21 139 999	17 734 419	19 299 390	21 822 377	23 040 251	5.6	-20.9	0.7	3.3	-0.7
(2) Land Development	545 299	596 680	1 683 826	1 145 622	1 100 971	-3.9	3.2	161.2	-37.9	-9.6
(3) Land Acquisition	277 255	156 813	132 233	249 878	229 889	-8.0	-46.6	-21.9	72.6	-13.5
SERVICES	121 495 887	124 233 701	132 316 580	150 437 760	156 206 075	3.8	-3.5	-1.4	3.9	-2.4
FINANCIAL INSTITUTIONS	944 145	1 677 375	2 287 006	3 090 795	3 334 269	7.9	67.6	26.2	23.5	1.4
TRANSPORT, STORAGE & COMMUNICATION	8 993 260	11 911 589	11 886 482	13 338 251	12 536 792	-6.0	24.9	-7.6	2.5	-11.6
ELECTRICITY, GAS & WATER	4 590 927	5 733 524	7 517 952	12 015 418	8 645 942	-28.0	17.8	21.4	46.0	-32.3
GOVERNMENT SERVICES	30 138 267	22 837 320	25 309 088	28 035 652	28 571 061	1.9	-28.5	2.6	1.2	-4.2
(1) Central Government	11 044 879	9 793 679	9 520 873	7 067 298	3 891 571	-44.9	-16.4	-10.0	-32.2	-48.2
(2) Local Government	1 477	39	44	6	179	2883.3	-97.5	4.4	-87.5	2705.1
(3) Selected Public Entities	15 086 881	12 189 529	15 219 351	20 495 732	24 065 838	17.4	-23.8	15.6	23.0	10.4
(4) Other Public Entities	4 005 030	854 073	568 820	472 616	613 473	29.8	-79.9	-38.3	-24.1	22.0
DISTRIBUTION	27 901 072	30 477 250	40 054 658	43 966 842	49 101 107	11.7	3.0	21.7	0.3	5.0
TOURISM	31 153 520	33 983 912	26 335 399	27 535 107	29 718 234	7.9	2.9	-28.3	-4.5	1.5
ENTERTAINMENT	448 362	513 885	1 132 480	2 045 651	2 130 751	4.2	8.1	104.0	65.0	-2.1
PROFESSIONAL & OTHER SERVICES	17 326 334	17 098 846	17 793 515	20 410 044	22 167 919	8.6	-6.9	-3.7	4.8	2.1
CONSUMPTION	94 640 184	109 590 099	135 151 644	167 371 006	178 123 948	6.4	9.2	14.2	13.1	0.1
PERSONAL	94 640 184	109 590 099	135 151 644	167 371 006	178 123 948	6.4	9.2	14.2	13.1	0.1
(1) Local Residents	87 881 669	102 153 988	127 342 775	156 312 678	164 882 818	5.5	9.7	15.4	12.1	-0.8
(2) Overseas Residents	6 758 515	7 436 111	7 808 869	11 058 328	13 241 130	19.7	3.8	-2.8	29.4	12.6
TOTAL	251 340 633	266 044 204	307 477 931	362 116 922	380 970 283	5.2	-0.1	7.0	7.6	-1.1

Source: Bank of Jamaica

TABLE 9.7
ASSETS OF INSTITUTIONS LICENSED UNDER THE FINANCIAL INSTITUTIONS ACT,
DECEMBER 2010-2014

	Dec-10	Dec-11	STOCK OF ASSETS (\$Million)			Real	
			Dec-12	Dec-13	Dec-14	% Change	%Change
Cash & Deposits with Banks & Other Institutions	1 000.7	841.5	1 259.2	1 305.3	1 887.8	44.6	36.0
Foreign Assets	11 731.6	9 876.2	11 716.4	14 083.8	15 188.5	7.8	1.4
Loans & Advances	7 250.1	6 885.4	5 625.1	7 093.1	9 253.9	30.5	22.7
Jamaican Government Securities	1 523.5	872.5	771.4	623.8	820.4	31.5	23.7
Other Assets	3 285.9	3 217.9	2 223.0	2 251.7	3 850.9	71.0	60.8
Total	24 791.9	21 693.5	21 595.1	25 357.6	31 001.6	22.3	14.9

Source: Bank of Jamaica

TABLE 9.8
LOANS & ADVANCES OUTSTANDING TO LICENSEES UNDER THE FINANCIAL INSTITUTIONS ACT
(\$MILLION)

	Dec 2012	Dec 2013	Dec 2014	% Change	Real
					% Change
Goods Producing	1 199.3	1 186	1 620.0	36.6	28.4
Agriculture	27.0	61.6	137.8	123.7	110.3
Mining, Quarrying & Processing	128.4	164.3	183.6	11.8	5.1
Manufacturing	304.5	360.2	381.6	5.9	-0.4
Construction & Land Development	739.4	599.9	917	52.9	43.7
Services	2 264.4	3 072.4	3 921.2	27.6	20
Transport Storage & Communication	0.4	193.5	114.5	-40.8	-44.3
Electricity, Gas & Water	0.0	2.5	2.1	-16	-21
Distribution	397.5	1 323.3	1 698.0	28.3	20.6
Tourism	120.0	201.4	261.2	29.7	21.9
Entertainment	0.0	57.6	51.4	-10.8	-16.2
Financial Institutions	47.5	137.7	309.8	125	111.6
Public Sector	0	0.0	0	-	-
Professional & Other Services	1 699	1 156.3	1 484.1	28.4	20.7
Consumption	2 161.5	2 834.6	3 764.3	32.8	24.9
Personal	2 161.5	2 834.6	3 764.3	32.8	24.9
TOTAL	5 625.2	7 093.1	9 305.5	31.2	23.4

Source: Bank of Jamaica

TABLE 9.9
ASSETS OF BUILDING SOCIETIES, 2010-2014

	Dec-10	Dec-11	Stock of Assets (\$Million)			Real	
			Dec-12	Dec-13	Dec-14	% Change	% Change
Cash & Deposits	5 236.6	3 103.4	7 478.4	11 788.6	4 575.4	-61.2	-63.5
Foreign Assets	24 795.4	32 987.6	35 862.1	45 389.8	55 080.2	21.3	14.1
Loans & Advances	87 260.6	89 339.6	95 879.1	97 376.5	107 174.0	10.1	3.5
Govt. Securities	13 449.6	24 171.4	26 475.6	24 446.0	21 041.7	-13.9	-19.1
Other Assets	38 535.6	37 321.5	37 217.7	33 756.6	44 438.4	31.6	23.8
TOTAL	169 277.8	186 923.5	202 913.0	212 757.5	232 309.7	9.2	2.7

Source: Bank of Jamaica

point year-over-year (Table 9.10). The downward trend was attributed mainly to lower rates for Installment Credit (down 0.87 percentage points to 16.39 per cent) and Mortgage Credit (down 0.06 percentage point to 9.79 per cent).

Year-end data for 2014 revealed that the average commercial banks' monthly weighted average deposit rates for 2013 was 2.21 per cent, 36 basis points more than in 2013 (Table 9.11). This reflected a rise in Time deposit rates despite declines in both the Demand and Savings deposit rates.

TABLE 9.10
COMMERCIAL BANKS' WEIGHTED AVERAGE MONTHLY LOAN RATES, 2013-2014
(PER CENT)

End of Period	Instalment credit		Mortgage credit		Personal Credit		Commercial Credit		Local Govt & Other Public Entities		Central Govt.		Overall	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
January	17.91	16.57	9.87	9.87	24.90	24.65	12.68	12.77	10.76	11.38	9.70	10.04	18.23	17.33
February	17.88	16.59	9.83	9.86	24.84	25.02	12.42	13.07	10.85	11.18	9.75	10.28	18.09	16.45
March	17.75	16.54	9.82	9.84	24.61	25.18	12.56	12.94	10.44	11.99	8.92	10.89	17.97	17.57
April	17.62	16.45	9.79	9.81	24.58	25.79	12.50	12.85	10.35	11.67	8.60	10.78	17.92	17.66
May	17.46	16.34	9.77	9.82	24.07	25.23	12.49	12.97	9.95	11.83	8.78	10.85	17.77	17.35
June	17.35	16.29	9.75	9.79	23.95	25.53	12.40	12.98	10.49	11.47	9.57	16.61	17.66	17.50
July	16.91	16.42	9.75	9.78	24.84	25.21	12.72	13.02	10.37	11.36	9.60	10.36	17.58	17.38
August	16.90	16.39	9.96	9.77	25.02	25.79	12.77	13.03	10.47	11.32	9.58	10.38	17.53	17.42
September	16.86	16.41	9.93	9.76	25.02	23.48	12.66	12.85	10.57	11.35	10.14	10.10	17.45	16.91
October	16.83	16.30	9.91	9.75	24.67	23.47	12.78	12.82	11.29	11.03	9.86	10.22	17.48	16.62
November	16.82	16.25	9.89	9.74	24.52	25.41	12.85	13.09	11.51	11.26	9.87	10.22	17.44	17.24
December	16.81	16.11	9.88	9.73	24.77	25.56	12.76	12.93	10.99	10.16	9.96	9.76	17.49	17.18
Average	17.26	16.39	9.85	9.79	24.65	25.03	12.63	12.94	10.67	11.33	9.53	10.87	17.72	17.22

Source: Bank of Jamaica

Additionally, the lower lending rate and higher deposit rate translated into a net interest rate spread of 15.01 per cent compared with 15.87 per cent at the end of 2013.

NON-DEPOSIT-TAKING INSTITUTIONS

Life Insurance Companies

The total number of Life Insurance companies remained unchanged at six. Collectively, Life Insurance companies continued to record profits of \$13.7 billion for 2014. The profitability of companies was driven by Net Premium Income which amounted to \$41.7 billion (Table 9.12).

General Insurance Companies

At year-end 2014, the total number of general insurance companies remained at 11. These companies amassed a Net Profit of \$2.9 billion, up 36.5 per cent compared with 2013 (Table 9.13). The increase in profitability was attributed mainly to an increase in Net Premium Income (up 11.6 per cent to \$16.0 billion)

Funds Under Management (FUM)⁵

At the end of September 2014, total FUM amounted to \$1 002.3 billion, denoting a 8.2 per cent year-over-year. The growth in funds invested was due to an increase in the amount of money managed by Securities Firms (up 8.8 per cent to

TABLE 9.11
COMMERCIAL BANKS MONTHLY WEIGHTED AVERAGE DEPOSIT RATES
(PER CENT)

End of Period	Demand		Savings		Time		Overall A/W Rates	
	2013	2014	2013	2014	2013	2014	2013	2014
January	1.39	1.46	1.45	0.98	3.58	3.73	1.98	1.77
February	1.42	1.49	1.10	1.00	3.58	3.82	1.82	1.85
March	1.33	1.51	1.08	0.98	3.55	4.50	1.80	1.98
April	1.31	1.59	1.08	1.02	3.32	5.07	1.67	2.26
May	1.66	1.46	0.98	1.05	3.44	4.64	1.74	2.12
June	1.68	1.51	0.96	1.02	3.21	5.03	1.61	2.29
July	1.61	1.61	0.96	0.96	3.35	5.38	1.71	2.41
August	1.57	1.54	1.00	0.99	3.65	5.00	1.81	2.21
September	1.50	1.51	0.98	0.98	3.88	4.47	1.97	2.05
October	1.56	1.44	0.99	0.96	4.19	4.30	1.97	1.93
November	1.58	1.25	1.00	0.90	4.34	4.35	2.03	3.01
December	1.56	1.25	0.98	0.88	4.26	3.98	2.04	2.64
Average	1.52	1.47	1.05	0.98	3.70	4.52	1.85	2.21

Source: Banks of Jamaica

⁵ At the time of writing, data for FUM were available as at the end of September 2014.

TABLE 9.12
PERFORMANCE INDICATORS OF
THE LIFE INSURANCE INDUSTRY, 2010-2014

Year	Number of Policies Sold	Net Premium Income \$Million
2010	117 141	25 697.7
2011	135 355	30 013.3
2012	155 600	31 772.1 ^r
2013	125 448 ^r	42 894.0 ^r
2014	82 747 ^p	41 673.7p

r- revised
p-preliminary

Source : Financial Services Commission

— value of transactions – down 10.0 per cent to \$12.8 billion.

Junior Stock Exchange Market⁶

The Junior Stock Market index fell by 9.2 per cent to 688.0 compared with the end of 2013. This outcome was facilitated by a decrease in the average price for stocks. Although, the average price of stocks depreciated, total market capitalization increased by 2.8 per cent to \$26.1 billion, as there were two newly listed companies (Knutsford Express Services Limited and Sweet River Abattoir & Supplies Company). Despite a decline of 38.9 per cent in the number of transactions to 4 374, the number of shares traded and value of transactions increased by 23.9 per cent to 592 million and 44.5 per cent to \$2.0 billion, respectively.

TABLE 9.13
PERFORMANCE INDICATORS FOR
THE GENERAL INSURANCE INDUSTRY, 2010-2014
\$ MILLION

Year	Assets	Liabilities	Net Premium Income	Profit/Loss (Net)
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	35 826.7	13 939.6	2 312.2
2013	57 292.5	38 678.1	14 317.0	2 117.3
2014 ^u	59 511.2	38 945.4	15 982.7	2 889.1

u - unaudited

Source: Financial Services Commission

\$752.6 billion); Unit Trust Management Companies (up 20.8 per cent to \$44.4 billion); Insurance Companies (up 2.9 per cent to \$170.8 billion); and Others (up 8.0 per cent to \$34.6 billion).

The Jamaica Stock Exchange (JSE)

The Jamaica Stock Exchange (JSE) index closed at 76 353.4, declining by 5.3 per cent relative to the end of 2013. This out-turn reflected a 39.7 per cent fall in total market capitalization to \$296.84 billion. There were two newly listed companies (138 Student Living Jamaica Limited and Sterling Investments Limited) on the main exchange, bringing the total to 33. For 2014, other key indicators performed as follows:

- number of transactions – down 12.1 per cent to 16 062
- volume of transactions – up 52.8 per cent to 2.1 billion

OUTLOOK

In 2015, the Finance & Insurance Services industry is projected to expand. This growth will be stimulated largely by a real increase in net interest income at deposit-taking institutions. The rise in interest income will be due to real growth in loan portfolios, facilitated by the downward trend in interest rates. Deposit-taking institutions will also benefit from the decline in delinquent loans which is expected to provide additional income as persons repay money owed to companies. Moreover, the industry is projected to generate more revenue from fees and commissions.

Life and General insurance companies are expected to contribute to the growth of the industry. The profitability of these companies will be driven by a rise in Net Premium and Net Investment incomes. Furthermore, the industry will be favourably impacted by the increase in the amount of money that will be invested on behalf of clients. ■

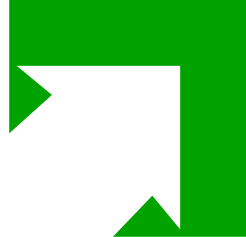
6 The Junior Stock Exchange Market was established to raise capital for Small and Medium Enterprises with shareholders equity being between \$50.0 million and \$500.0 million.

SECTORAL PERFORMANCE



Visitors to the Food and Agriculture Organization (FAO) International Year of Family Farming (IYFF) booth at Denbigh.

Photograph contributed by FAO



AGRICULTURE

INTRODUCTION

Real value added for the Agriculture, Forestry & Fishing industry for calendar year 2014 declined by 0.4 per cent and accounted for 6.6 per cent of Gross Domestic Product (Figure 10A). In the first half of the year, the industry improved by 17.2 per cent relative to the corresponding period of 2013. This improvement reflected the gradual recovery from the lingering effects of Hurricane Sandy in October 2012 and drought conditions during January–April 2013. This performance was facilitated by government initiatives such as the Hurricane Sandy Recovery Programme from which farmers benefited through the receipt of replacement planting materials. However, drought conditions in the second half of the year detracted from the gains of the first six months with a 17.7 per cent decline in output. The drought conditions curtailed planting activities and lowered crop yields. Information from the Climate Branch of the Meteorological Service of Jamaica indicated that for the months of June and July of 2014, the island recorded rainfall levels of 33.0 per cent and 37.0 per cent of the 30-year mean, respectively. Although rainfall levels improved in the latter months of the year, production levels for the period were already impacted.

The Planning Institute of Jamaica’s Agriculture Production Index indicated that gross output for the sub-industries, Traditional Export Crops and Animal Farming, grew by 30.5 per cent and 4.4 per cent, respectively. However, reduced output was recorded for Other Agricultural Crops, Post Harvest

Activities and Fishing by 7.6 per cent, 25.0 per cent and 0.7 per cent, respectively (Table 10.1).

Export earnings from traditional agricultural commodities¹ were valued at US\$17.0 million compared with US\$22.1 million in 2013 (Table 10.2). Reduced earnings were recorded for Coffee, Citrus and Pimento. Earnings from Coffee declined by 17.4 per cent to US\$13.5 million, while earnings for Citrus declined by 47.9 per cent to US\$1.7 million. Pimento earnings went down by 69.7 per cent to US\$0.6 million. Improved earnings were recorded for Banana (up 188.7 per cent to US\$0.2 million) and Cocoa (up 104.0 per cent to US\$1.0 million).

POLICIES AND PROGRAMMES

The Ministry of Agriculture & Fisheries (MOAF) continued to pursue the development of an efficient, competitive and diversified industry in keeping with the Vision 2030 Jamaica – National Development Plan. The plan is aimed at strengthening the contribution of the industry to national food security and to the achievement of long-term development. The priority policies, programmes and projects during 2014 were as follows:

National Plant Health Policy – Implementation Plan

The Implementation Plan, which was drafted in 2013, was approved in March 2014. This Plan, in seeking to improve

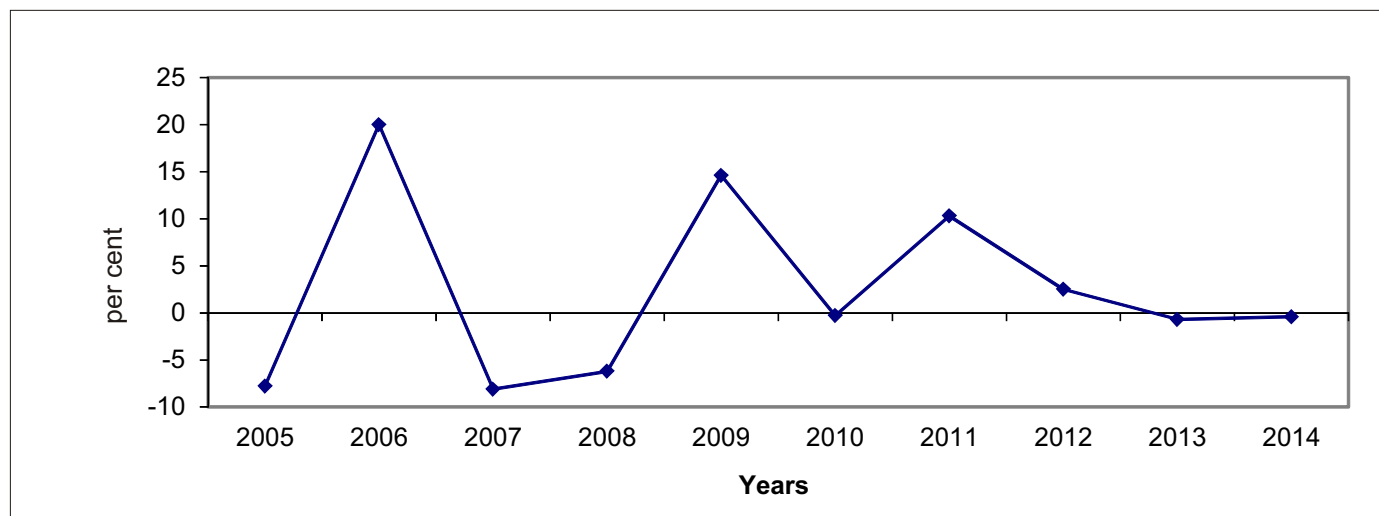


FIGURE 10A : REAL VALUE ADDED GROWTH RATE FOR AGRICULTURE, FORESTRY & FISHING

¹ These are coffee, bananas, citrus, cocoa and pimento.

TABLE 10.1
AGRICULTURE PRODUCTION INDEX (r)
2007=100

YEAR	SUB-INDUSTRIES					TOTAL
	TRADITIONAL EXPORT CROPS	OTHER AGRICULTURAL CROPS	ANIMAL FARMING	FISHING	POST HARVEST ACTIVITIES	
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	82.9	141.2	101.8	96.8	65.4	119.1
2014	108.1	130.5	106.3	96.1	49.0	117.9
% Change 2014/2013	30.5	-7.6	4.4	-0.7	-25.0	-1.0

r - revised

Discrepancies in table due to rounding

Source: Planning Institute of Jamaica

Jamaica's plant health, will focus on the revision of existing legislation, building of institutional capacity, scientific systems, quarantine capacity, surveillance systems, emergency response for pest outbreaks and increased public awareness.

The National Fisheries Policy

Work continued on the drafting of the National Fisheries Policy (NFP) including consultations with key stakeholders. The policy will address areas such as: sustainable development, management and conservation of the fisheries sub-industry; greater efficiency and improved competitiveness of national fisheries enterprises; economic and social development of fishers and fishing communities; and the forging of partnerships with stakeholders in the management of fisheries to ensure transparency and accountability in the governance of fisheries resources.

Projects/Programmes

Various projects and programmes were pursued by the MOAF to achieve its developmental goals. The main projects/programmes pursued during 2014 were as follows:

Agro Park Development Project

The primary objective of the Agro Park² project is to facilitate the expansion of the productive capacity of the agricultural sector. This objective is to be realized 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. The Agro Park project began in 2012, and at the end of 2014, nine Agro Parks had been established. The infrastructural works to these Agro Parks were at different stages of development as various processes were required to obtain funding for these projects. These Agro Park were: Plantain Garden River, St.

TABLE 10.2
VALUE OF AGRICULTURAL EXPORTS, 2010 - 2014
(US\$' 000)

	2010	2011	2012	2013	2014 ^p	% Change 2014/2013
Traditional Export Crops						
Bananas	1	63	120	62	179	188.7
Citrus (Fresh Fruit)	1 831	2 180	1 883	3 322	1 742	-47.9
Coffee	19 191	18 326	13 778	16 327	13 479	-17.4
Cocoa	1 021	1 108	1 936	504	1 028	104.0
Pimento	2 866	1 835	2 303	1 912	579	-69.7
TOTAL	24 910	23 512	20 020	22 127	16 997	-23.2

p - preliminary

Source: Statistical Institute of Jamaica

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.

TABLE 10.3
PRODUCTION STATISTICS: SUGAR CANE AND DERIVATIVES, 2010 - 2014

PARTICULARS	UNIT OF MEASURE	2010	2011	2012	2013	2014
		Cane Milled (Crop Year)				
Total	'000 tonnes	1 390.1	1 518.3	1 475.2	1 402.6	1 779.3
Farmers		572.1	613.0	561.6	573.4	775.3
Estates		817.9	905.3	913.6	829.2	1 003.9
Sugar Production (Commercial)						
Calendar Year	'000 tonnes	116.5	137.8	130.7	120.4	143.2
Crop Year	'000 tonnes	117.2	134.3	126.4	122.8	148.3
Acreages Reaped (Industry)	'000 hectares	27.6	27.9	28.1	29.2	29.7
Farmers		10.9	10.6	10.9	12.6	13.1
Estates		16.7	17.3	17.1	16.6	16.6
Tonnes Cane Per Hectare						
Industry		50.3	54.4	52.6	48.0	59.9
Farmers		52.6	57.8	51.3	45.6	59.2
Estates		48.9	52.4	53.4	49.9	60.4
Tonnes Cane Per Tonne Commercial Sugar		11.86	11.31	11.21	11.42	12.00
Tonnes Cane Per Tonne 96 Sugar		11.41	10.88	11.21	10.94	11.53
Tonnes Sugar Per Hectare		4.41	5.01	4.69	4.39	5.20
Molasses						
Production	'000 tonnes	57 814	59 951	57 166	54 878	71 746
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

Thomas; Yallahs, St. Thomas; Amity Hall, St. Catherine; Hill Run, St. Catherine; Ebony Park, Clarendon; New Forest/Duff House, St. Elizabeth/Manchester; Meylersfield, Westmoreland; Spring Plain, Clarendon; and Sweet River Multi-species Abattoir, Westmoreland. Total lands of 3 280 hectares were targeted under the Agro Parks initiative for 2014/15. Some 615 hectares of these were under the management of private investors. Of the remaining 2 665 hectares, 1 546 hectares were already leased while the remaining amounts were at different stages of the lease agreement process. The main crops established were

vegetables, condiments, tubers and fruits. The Agro Parks provided employment for approximately 1 428 persons during 2014.

Rationalization Of The Agricultural Commodity Boards And Export Division

The MOAF continued the process of rationalization of the Agricultural Commodity Boards for Coffee, Cocoa, Coconut and the Export Division into a single regulatory body. The process was advanced with various stakeholders negotiations

TABLE 10.4
SUGAR EXPORTS BY DESTINATION, 2010 - 2014

DESTINATION	2010		2011		2012		2013		2014	
	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000
EUROPEAN UNION	78 639	36.5	94 440	51.1	103 118	95.3	82 405	71 086	77 457	59 406
USA	13 980	9.1	16 283	13.2	0	0	0	0	11 016	5 883
OTHER	280	0.2	27	0.03	36	0.04	64	78	36	51
TOTAL	92 899	45.8	110 750	64.3	103 154	95.3	82 469	71 164	88 509	65 340

Source: Sugar Industry Authority

regarding the nature of the new regulatory body. The legal framework to effect the operational aspects of the organization was also addressed. A first draft of the Jamaica Agricultural Commodities Regulatory Authority (JACRA) Bill was completed and made available for comments. Concurrent actions including staff-related matters, physical location and divestment of commercial assets were at an advanced stage. The JACRA is expected to be operational in 2015 subject to the passage of the Bill.

Strengthening of the Ministry's Food Safety Infrastructure

In accordance with international and local food health and safety requirements and standards, the MOAF continued the process of developing and implementing a strategic planning framework for the Abattoir Meat Science System in Jamaica. This will be pivotal in facilitating trade in the international meat market and supporting capacity building through teaching and certification in quality standards for meat production through public-private partnerships. Three main initiatives were identified to advance the process. 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.

During 2014, the following developments were achieved:

- completion of a draft training curriculum for butchers and meat processors
- finalization of standards and protocols to guide the establishment of modern slaughter facilities in accordance with international requirements
- commencement of operation of the National Animal Identification and Traceability System database
- advancement of the tagging process for cattle.

PERFORMANCE OF THE AGRICULTURE, FORESTRY & FISHING INDUSTRY

The Agriculture, Forestry & Fishing industry declined by 0.4 per cent during 2014. Growth was experienced in the first half of the year but this was outweighed by a decline in the second half of the year due to drought conditions. Overall declines were recorded for Other Agricultural Crops, Fishing and Post Harvest Activities, while increases were recorded for the sub-industries Traditional Export Crops and Animal Farming (see Table 10.1).

TRADITIONAL EXPORT CROPS

Gross output for Traditional Export Crops increased by 30.5 per cent (see Table 10.1). The increase in output was attributed to improved output for the crops Banana, Sugar Cane and Cocoa. Banana and Sugar Cane combined accounted for over 80 per cent of the value of the Traditional Export Crops sub-industry. Earnings from Traditional Export Crops were US\$17.0 million compared with US\$22.1 million in 2013. The decline in the value of exports was due mainly to reduced earnings from Coffee (down 17.4 per cent to US\$13.5 million), Pimento (down 69.7 per cent to US\$0.6 million) and Citrus (down 47.9 per cent to US\$1.7 million). However, the value of Cocoa exports improved by 104.0 per cent to US\$1.0 million and Banana by 188.7 per cent to US\$0.2 million (see Table 10.2).

Sugar Cane

For the 2013/2014 crop year (November 2013-October 2014), 1 779 258 tonnes of sugar cane were milled which produced 148 271 tonnes of sugar (Table 10.3). This compared with the previous crop year when 1 402 564 tonnes of sugar cane were milled, which yielded 122 835 tonnes of sugar. The increase in the volume of sugar cane milled was made possible by the programmes: Sugar Cane Replanting Loan Programme; and the Cane Expansion Programme, which facilitated the

TABLE 10.5
PRODUCTION OF SELECTED TRADITIONAL EXPORT CROPS, 2010 - 2014

PARTICULARS	CROP-YEAR	UNIT	2010	2011	2012	2013	2014	% Change
								2014 /2013
1. Bananas	January - December	Tonnes	53 649	46 660	47 473	37 211	51 581	38.6
2. Citrus								
Estimated Total Production	July - June	Tonnes	117 440	106 922	97 072	83 758	71 194	-15.0
Sweet Orange			108 376	100 093	91 657	79 178	67 302	-15.0
Grapefruit			1 421	800	571	614	522	-15.0
Ortanique			5 819	4 661	3 960	3 426	2 912	-15.0
Ugli			1 824	1 368	884	540	459	-15.0
3. Coffee (Cherry)	August - July							
Estimated Total Production		Tonnes	9 121	8 099	6 687	6 984	5 298	-24.1
Blue Mountain			7 535	6 574	5 576	5 839	4 425	-24.2
Non- Blue Mountain			1 586	1 543	1 111	1 146	873	-23.8
4. Cocoa	October - September							
a) Deliveries to Processing Plants		Tonnes	1 368	499	1 393	997	1 154	15.7
b) Out-turn from Processing Plants		Tonnes	545	200	557	399	462	15.8
5. Coconut	January - December	Millions	95.3	95.6	96.4	97.4	98.5	1.1

Source: Commodity Boards

TABLE 10.6
FARMGATE PRICES OF SELECTED TRADITIONAL EXPORT CROPS, 2010 - 2014

PARTICULARS	UNIT	2010	2011	2012	2013	2014 ^p	% Change 2014 /2013
1. Sugar	J\$/Tonne	40 641	47 925	75 594	75 594	80 020	5.9
2. Bananas Price to Growers	J\$/Tonne	44 000	44 000	55 115	55 115	55 115	0.0
3. Citrus Oranges	J\$/Tonne(Sol- ids)	121 000	168 000	212 800	209 000	246 400	17.9
Ortaniques	J\$/Tonne(Sol- ids)	121 000	168 000	212 800	209 000	246 400	17.9
Grapefruits	J\$/box	185	185	220	380	420	10.5
4. Coffee Price to Growers	J\$/Tonne	117 211	113 677	121 253	128 602	183 717	42.9
- Blue Mountain	J\$/Tonne	67 975	69 673	73 487	91 858	95 533	4.0
- Non-Blue Mountain							
5. Cocoa	J\$/Tonne	146 006	162 000	200 000	200 000	200 000	0.0
6. Pimento	J\$/Tonne	187 390	253 000	253 000	264 000	418 875	50.0
7. Coconut Seeds	J\$/Seed	35	50	50	50	50	0.0

p - preliminary

Source: Based on data supplied by Commodity Boards and the Ministry of Agriculture & Fisheries

replanting and expansion of sugar cane. As a result, sugar cane supply increased by 26.9 per cent. Sugar cane supplied by the Private Farms³ increased by 35.2 per cent to 775 309 tonnes while sugar cane supplied by Estates increased by 21.0 per cent to 1 003 949 tonnes (see Table 10.3).

There was a deterioration in the quality of sugar cane produced. This was reflected in the tc:ts ratio⁴ (the amount of sugar cane used to produce one tonne of sugar) which moved to 11.53 tonnes from 10.94 tonnes in the previous crop year. This was linked to adverse weather conditions and mechanical problems at some of the sugar factories.

For the 2013/14 crop year, the ex-factory price for sugar was \$80 020 per tonne, moving from \$75 594 in 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 2014 was 88 509 tonnes valued at US\$65.3 million compared with 82 469 tonnes in 2013 valued at US\$71.2 million (Table 10.4). The decline in earnings from exports reflected a downward movement in the price of sugar obtained on the export market. The majority of the sugar was exported to the European Union (77 457 tonnes), while 11 016 tonnes was exported to the USA and 36 tonnes to Other destinations.

Bananas⁵

Banana production during 2014 was estimated at 51 581 tonnes compared with 37 211 tonnes in 2013 (Table 10.5). Production was the highest in four years. The overall improvement in output was due primarily to increased yields in the first half of 2014 which outweighed a decline in the second half of the year, as the banana industry continued to recover from the impact of Hurricane Sandy. Farmers were assisted with inputs to aid the recovery process. However, drought conditions during the second half of the year led to a decline in yields for that period. During July 2014, the main banana growing parishes of St. Mary, St. Thomas and Portland recorded rainfall levels of 1.0 per cent, 10 per cent and 23 per cent of the 30 year mean, respectively. In 2014, a total of 199.2 tonnes of the fruit valued at US\$179 217 was exported compared with 76.6 tonnes valued at US\$61 703 in 2013.

Coffee

The volume of coffee berries delivered to processing plants during the 2013/14 crop year (August 2013 – July 2014) declined by 24.1 per cent to 5 298 tonnes compared with the previous crop year (see Table 10.5). This represented the lowest national production since the 1988/89 crop year when

³ Sugar cane is supplied to the factories from two sources, namely, Private Farms and the Estates operated by the factories.

⁴ tonnes cane:tonnes sugar

⁵ Based on national accounting conventions stipulated by the Statistical Institute of Jamaica, banana production for both export and domestic consumption is captured in the Traditional Export Crop category.

TABLE 10.7
DOMESTIC CROP PRODUCTION, 2010 - 2014

PARTICULARS	UNIT OF MEASUREMENT	2010	2011	2012	2013	2014 ^P	% Change 2014/2013
DOMESTIC FOOD CROPS	Tonnes	500 304	592 108	610 138	614 912	580 232	-5.6
Legumes	Tonnes	3 930	5 091	5 261	5 501	4 911	-10.7
Gungo Peas		749	965	951	957	913	-4.6
Red Peas		682	906	987	1 069	919	-14.0
Peanut		2 007	2 643	2 701	2 832	2 465	-13.0
Other Legumes		492	577	622	643	614	-4.5
Vegetables	Tonnes	165 457	223 545	224 131	233 226	206 097	-11.6
Cabbage		24 515	33 046	32 687	34 584	31 993	-7.5
Callaloo		12 886	15 693	16 607	15 840	14 472	-8.6
Carrot		21 026	32 004	29 528	31 829	24 080	-24.3
Cho Cho		3 876	4 691	5 394	4 907	4 525	-7.8
Cucumber		11 681	16 025	16 617	17 425	15 512	-11.0
Lettuce		7 203	11 185	10 372	11 368	11 299	-0.6
Okra		4 202	5 513	6 344	6 701	5 942	-11.3
Pumpkin		39 292	49 432	52 170	52 072	46 763	-10.2
Tomato		19 006	26 950	26 526	29 128	25 238	-13.4
Other Vegetables		21 770	26 006	27 886	28 572	26 273	-8.0
Condiments	Tonnes	34 706	44 712	46 854	52 295	45 392	-13.2
Escallion		11 194	13 908	14 142	16 296	12 436	-23.7
Onion		555	1 015	1 088	680	691	1.7
Hot Pepper		11 206	13 293	14 263	15 204	14 101	-7.3
Sweet Pepper		10 017	14 998	15 155	17 396	15 445	-11.2
Other Condiments		1 735	1 498	2 206	2 719	2 719	0.0
Fruits	Tonnes	38 002	38 742	45 023	46 325	44 446	-4.1
Cantelope		2 333	2 624	3 243	3 469	3 352	-3.4
Paw-Paw		5 314	5 846	6 455	8 382	9 102	8.6
Pineapple		19 749	17 607	19 757	19 185	18 374	-4.2
Watermelon		10 606	12 666	15 569	15 288	13 618	-10.9
Cereals	Tonnes	2 627	2 968	3 121	2 497	2 206.3	-11.6
Corn		2 363	2 733	2 822	2 965	2 507	-15.4
Rice		264	235	299	31	5	-83.9
Plantain	Tonnes	29 826	35 335	36 203	30 937	40 488	30.9
Horse Plantain		23 519	27 509	27 381	23 568	31 006	31.6
Other Plantain		6 307	7 826	8 822	7 369	9 482	28.7
Yams	Tonnes	136 785	134 620	145 059	138 834	135 303	-2.5
Lucea		10 744	9 138	9 412	10 208	7 826	-23.3
Negro		15 163	16 311	15 632	15 301	14 010	-8.4
Renta		9 444	9 892	10 017	9 038	8 450	-6.5
St. Vincent		2 902	2 801	2 420	2 104	2 203	4.7
Sweet		3 907	3 291	2 609	1 805	1 768	-2.1
Tau		2 442	2 507	2 675	3 207	3 565	11.1
Yellow		89 944	88 601	100 325	95 334	95 654	0.3
Other Yam		2 240	2 079	1 971	1 836	1 828	-0.4
Other Tubers	Tonnes	42 181	48 459	45 713	41 670	40 882	-1.9
Bitter Cassava		6 426	7 522	6 036	5 750	5 820	1.2
Sweet Cassava		12 064	13 011	11 984	11 621	10 739	-7.6
Coco		7 494	9 432	9 805	9 160	9 541	4.2
Dasheen		16 196	18 493	17 888	15 140	14 782	-2.4
Potatoes	Tonnes	45 734	57 424	57 561	61 645	58 988	-4.3
Irish		11 222	15 333	15 395	17 421	19 577	12.4
Sweet		34 512	42 091	42 165	44 224	39 412	-10.9
Sorrel	Tonnes	1 057	1 212	1 212	1 483	1 214	-18.1

Discrepancies in table due to rounding

Source: Ministry of Agriculture & Fisheries

TABLE 10.8
DOMESTIC FARMGATE PRICE INDEX, 2010 - 2014
2007 = 100

	2010	2011	2012	2013	2014	%Change 2014/2013
LEGUMES	154.3	184.2	175.0	191.3	191.0	-0.2
ROOTS & TUBERS	143.0	163.3	146.4	180.0	183.1	1.7
OTHER TUBERS	155.1	142.3	138.5	192.2	193.7	0.8
CEREALS	138.1	203.7	173.0	169.2	229.7	35.8
CONDIMENTS	127.6	97.4	99.8	93.9	136.6	45.5
FRUITS	132.2	129.6	127.5	148.4	137.8	-7.1
VEGETABLES	151.3	119.1	128.6	133.0	156.9	17.9
OVERALL INDEX	144.7	146.7	139.2	165.3	172.8	4.6

Discrepancies in table due to rounding

Source: Planning Institute of Jamaica

the industry was severely affected by Hurricane Gilbert. The decline in production was linked to:

- the Coffee Leaf Rust Disease⁶ which reduced the productive capacity of coffee plants
- a sustained reduction in demand and lower market prices.

Deliveries of Blue Mountain cherry coffee declined by 24.2 per cent to 4 425 tonnes, while Non-Blue Mountain cherry coffee went down by 23.8 per cent to 873 tonnes (see Table 10.5). The weighted average farmgate price paid for Blue Mountain cherry coffee and Non-Blue Mountain cherry coffee was \$183 717 per tonne and \$95 533 per tonne, respectively (Table 10.6). The value of coffee exported during 2014 was US\$13.5 million compared with US\$16.3 million in 2013.

Citrus

For the 2013/14 crop year (July 2013-June 2014), overall citrus production was estimated at 71 194 tonnes, reflecting a decline of 15.0 per cent (see Table 10.5). The Citrus Greening Disease continued in 2014 to be the main reason for the decline in this sub-industry. Infected trees produced predominantly green fruits which failed to ripen. The Citrus Greening Disease in the industry led to a decline of all citrus crops in Jamaica.

Coconut

Coconut production in 2014 was estimated at 98.5 million compared with 97.4 million in 2013 (see Table 10.5). The improvement in output was due to the continued effort of the Coconut Industry Board (CIB) in implementing planting and

TABLE 10.9
LIVESTOCK PRODUCTION, 2010 - 2014

PARTICULARS	UNIT OF MEASUREMENT	2010	2011	2012	2013	2014 ^p	% Change 2014/2013
LIVESTOCK SLAUGHTER							
	Heads						
Cattle	"	20 404	21 218	21 495	20 790	n/a	-
Hogs	"	108 568	108 961	142 716	108 936	n/a	-
Goats	"	49 085	56 498	54 694	52 682	n/a	-
Sheep	"	400	852	1 296	1 144	n/a	-
MEAT, FISH AND DAIRY							
Beef & Veal	000 kgs.	5 264	5 621	5 800	6 221	n/a	-
Pork	" "	7 973	7 110	9 490	8 998	n/a	-
Goats Flesh	" "	937	1 316	1 094	929	n/a	-
Mutton	" "	11	23	32	24	n/a	-
Poultry	" "	100 637	101 526	102 167	101 933	110 502	8.4
Aquaculture (Tilapia, Shrimp)	Tonnes	4 184	1 150	644	836	698	-16.5
Marine (Fish, Conch, Lobster, Shrimp)	" "	12 314	14 208	10 494	14 263	n/a	-
Eggs	Million	109.0	137.5	170.2	125.0	121.9	-2.5
Milk	Million Litres	12.5	12.4	12.9	12.3	11.9	-3.2

n/a - not available

p - preliminary

Discrepancies in table due to rounding

Source: Ministry of Agriculture & Fisheries; Ministry of Health

⁶ The Coffee Leaf Rust Disease infected approximately 35 per cent of over 2000 acres.

disease eradication measures to ensure the sustainability and expansion of the industry.

The CIB continued to make positive steps towards developing a variety of coconut which will be resistant to the Lethal Yellowing disease. During 2014, a total of 5 530 trees were lost to the disease compared with approximately 4 623 trees in 2013 and 10 062 trees in 2012. The CIB continued to build on the success of the Sustainable Coconut Production through Control of Coconut Lethal Yellowing 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 2014, the Board distributed 39 228 coconut seedlings to farmers compared with 112 521 in 2013.

Although the coconut industry continued to be negatively impacted by the Lethal Yellowing Disease, knowledge gained from the Sustainable Coconut Production through Control of Coconut Lethal Yellowing project continued to be beneficial to the curtailment of the disease.

The project, which began in 2007 and ended in 2012, was designed to strengthen the research and development capacity of countries affected by the Coconut Lethal Yellowing disease in the Caribbean and Central America, so as to prevent the destruction of the coconut industry due to disease. A network comprising 14 institutions in 11 countries and a lethal yellowing related website were established, as well as improved collaboration among research institutions.

Cocoa

The volume of wet cocoa beans delivered to fermentaries for the 2013/14 crop year (October 2013–September 2014) amounted to 1 154.0 tonnes compared with 997 tonnes in the previous crop year (see Table 10.5). The improvement in output may be attributed to the significant rehabilitation and replanting programme following the impact of Hurricane Sandy. In addition, measures to strengthen extension services and improve operational efficiencies were implemented. Further improvements in cocoa production were, however, stymied by drought conditions during the crop year.

The Farmgate price paid to farmers was \$200 000 per tonne (see Table 10.6). The value of exports for the calendar year 2014 was US\$1.0 million compared with US\$0.5 million in 2013 (see Table 10.2).

OTHER AGRICULTURAL CROPS

Other Agricultural Crops (which comprised mainly Domestic Crops) declined by 7.6 per cent in gross output during 2014 (see Table 10.1). This sub-industry recorded a 10.0 per cent increase in the first half of the year but this was negated by a 23.8 per cent decline in the latter half of the year. The decline in Other Agricultural Crops was due to drought conditions which curtailed planting activities and lowered yields for crops.

The severity of the drought resulted in eight of the nine crop groups declining in production, ranging from 1.9 per cent for Other Tubers to 16.2 per cent for Cereals. The only crop group which recorded an increase in production was Plantains which grew by 30.9 per cent. Plantains, the majority of which was destroyed by Hurricane Sandy in October 2012, recovered and was less susceptible to drought conditions (Table 10.7).

As a result of the decline in production, the Domestic Farmgate Price Index showed an overall increase of 4.6 per cent. Five of the seven crop groups recorded increased prices of between 0.8 per cent for Other Tubers to 35.8 per cent for cereals. The overall price of Roots and Tubers, which is weighted at just over 50.0 per cent in the group, increased by 1.7 per cent. Reduced prices were recorded for Fruits (down 7.1 per cent) and Legumes (down 0.2 per cent) {Table 10.8}.

The drought conditions caused a reduction in the area of Domestic Crops reaped. The area of Domestic Crops reaped declined by 6.3 per cent to 42 877.9 hectares. St. Elizabeth accounted for the largest share of Domestic Crops reaped with 9 985.7 hectares, followed by Manchester with 6 830.5 hectares and Trelawny with 6 289.4 hectares. These three parishes accounted for 53.8 per cent of the total area of Domestic Crops reaped during 2014, down from 56.2 per cent in 2013.

FISHING

For calendar year 2014, overall Fishing production was estimated to have declined by 0.7 per cent. The decline in production was due to a fall-off in both Aquaculture and Marine production. Aquaculture production declined by 16.5 per cent to 698 tonnes (Table 10.9). The fall-off in production was attributed to:

- scarcity of red tilapia seed stock which negatively impacted production
- high feed cost
- inability to compete with cheaper fish imports
- drought conditions which affected pond operations.

Factors which affected marine production were:

- pollution of major fishing grounds from nearby factories, shipping activities and coastal developments
- higher prices of fuel for outboard engines.

At the end of 2014, there were 23 507 registered fishers and 7 007 registered boats operating from 187 fishing beaches and two cays located at the Pedro Bank. This compared with 23 323 registered fishers and 6 300 registered boats operating from 187 fishing beaches at the end of 2013.

FINANCING TO THE INDUSTRY

The Development Bank of Jamaica (DBJ) during 2014 provided loans for potentially viable agriculture and agro-processing projects through the People's Cooperative (PC) Bank and other Approved Financial Institutions (AFIs). The uptake of loan funds amounted to \$1 166.9 million compared with \$2 184.7 million in 2013 (Table 10.10). There were no applications for foreign currency loans in 2014 or in 2013. In 2012, foreign currency loans disbursed amounted to US\$5.8 million.

For agricultural projects, the uptake of loan funds declined from \$2 109.7 million in 2013 to \$742.4 million while the uptake of loans for Agro-Processing activities increased to \$424.5 million from \$75.0 million (Table 10.10). All of the major sub-industries for agricultural projects recorded declines in the uptake of loans. The most significant decline was recorded for Livestock which moved from \$1 271.1 million in 2013 to \$589.0 million. This was due mainly to the fall-off of investment in the Poultry sub-industry which moved from \$1 074.0 million in 2013 to \$570.7 million. There was also a

TABLE 10.10
DEVELOPMENT BANK OF JAMAICA: LOAN ALLOCATION TO THE AGRICULTURE INDUSTRY:2010 - 2014
(J\$ '000)

SUB-INDUSTRIES	2010	2011	2012	2013	2014
Domestic Crops					
Cassava	0	0	0	0	0
Sweet Potatoes	822	7 539	0	0	0
Irish Potatoes	19 691	129 560	2 500	23 700	17 600
Peanuts	0	0	0	0	0
Pineapple	0	0	0	0	0
Pumpkin	0	200	0	0	0
Bananas/Plantain	630	3 310	14 777	0	6 100
Pepper	0	4 050	2 270	1 200	5 000
Yams	17 823	1 450	1 000	0	2 000
Greenhouse Vegetables	178 856	37 330	17 000	2 550	0
Ginger	0	0.0	1 150	850.0	0
Vegetables	19 567	17 000	850	1 500	5 500
Melon	660	0	0	0	0
Horticulture	0	1 535	0	0	3 700
Onion	0	130 500	0	5 440	0
Escallion	5 898	0	0	0	0
Other Crops	79 475	27 098	0	8 000	0
SUB-TOTAL	323 422	359 572	39 547	43 240	39 900
Livestock					
Cattle	29 860	26 300	22 462	15 602	15 287
Pasture	0	0	0	0	0
Small Stock (sheep, goat)	30 000	20 000	0	0	0
Piggery	33 360	275 972	20 123	178 512	0
Poultry	33 749	131 713	177 400	1 073 972	570 669
Fishing	1 550	4 397	1 500	3 000	0
Other Livestock	0	0.0	0	0	0
Bee Keeping	2 504	7 200	1 950	0	3 000
SUB-TOTAL	131 022	465 582	223 435	1 271 086	588 956
Export Crops					
Bananas	0	0	0	34 546	0
Cocoa	0	0	0	0	0
Coffee	10 560	0	0	4 361	0
Citrus	0	0	13 220	1 016	0
Sugar Cane	6 754	8 010	2 500	344 317	0
Papaya	1 000	2 000	0	0	500
SUB-TOTAL	18 314	10 010	15 720	384 240	500.0
Farm Infrastructure					
Farm Equipment	1 180	0	5 000	5 893	0
Farm Buildings	8 500	0	0	0	3 118
Farm Vehicle	16 775	10 000	4 963	6 550	0
Farm Store	2 628	0	9 264	3 600	5 000
biodigester	0	43 300	0	0	0
Other/Energy	0	0	0	323 000	24 750
SUB-TOTAL	29 083	53 300	19 227	339 043	32 868
Micro Financing Industry			61 576	72 097	80 182
TOTAL AGRICULTURE	501 842	888 464	359 506	2 109 705	742 406
AGRO-PROCESSING					
Agro-Processing Commodity	258 581	111 600	71 000	67 000	390 000
Food Processing	12 794	143 513	245 650	8 000	34 500
Beverages/Juices	0	12 000	0	0	0
SUB-TOTAL	271 375	267 113	316 650	75 000	424 500
GRAND TOTAL	773 217	1 155 577	676 156	2 184 705	1 166 906

Source: Development Bank of Jamaica

TABLE 10.11
QUARTERLY INTEREST RATES APPLIED TO AGRICULTURAL LOANS : 2014

LINES OF FUNDING	JANUARY - JUNE		JULY - DECEMBER	
	RATE TO AFI (%)	RATE TO SUB-BORROWER (%)	RATE TO AFI (%)	RATE TO SUB-BORROWER (%)
DBJ Regular	6.5	9.5	7.0	10.00
Dairy Revitalization	1.0	4.0	2.0	5.00
CDB	4.0	9.5	4.0	9.50
CDB/MOAF	4.0	5.0	4.0	5.00
PetroCaribe/DBJ/ MFI	10.0	not more than 1% per week	10.0	not more than 1% per week
DBJ - Direct	n/a	9.5	n/a	10.00

n/a - not applicable

Source: Development Bank of Jamaica

TABLE 10.12
AGRICULTURAL CREDIT, 2010 - 2014
(J\$'000)

INSTITUTIONS	2010	2011	2012	2013	2014
Development Bank of Jamaica					
Total Loans Outstanding	2 440 733	3 461 736	2 422 924	2 853 903	3 497 266
Loans Issued (disbursed)	8 528 397	10 708 749	11 638 473	14 149 437	15 261 234
Loans Repaid	6 087 664	7 247 013	9 215 549	11 295 534	11 763 968
Commercial Banks					
Loans and Advances					
Outstanding	760 692	1 065 033	1 207 099	1 347 169	2 036 254

Source: Development Bank of Jamaica

significant decline in the uptake of loans to the Farm Infrastructure and Export Crops sub-industries. The Farm Infrastructure sub-industry loan uptake declined from \$339.0 million in 2013 to \$32.9 million due to a decline in loans for energy-related activities. For the Export Crops sub-industry, there was a decline from \$384.2 million in 2013 to \$0.5 million due to reduced loan uptake 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). These lending rates remained constant for the first six months of the year but in some cases were adjusted upward in the second half of the year. At the end of 2014, the lowest interest rate of 5.0 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. The CDB line of credit in collaboration with MOAF was also offered at a 5.0 per cent interest rate and was geared towards revitalization of the banana industry. The PetroCaribe/DBJ line of credit which targeted projects from the Micro Finance Institutions attracted a higher level of interest rate due to limited collateral requirements.

The total stock of agricultural loans outstanding at the DBJ at the end of 2014 was \$3 497.3 million relative to \$2 853.9

million at the end of 2013 (Table 10.12). Loans issued amounted to \$15 261.2 million and the amount repaid was \$11 764.0 million. The stock of loans outstanding at commercial banks was \$2 036.3 million compared with \$1 347.2 million at the end of 2013.

OUTLOOK

The Agriculture, Forestry & Fishing industry is expected to record positive growth in 2015. Although the industry was negatively impacted by drought conditions in the second half of 2014, full recovery is anticipated. Continued growth will be based on:

- favourable weather conditions
- the continued expansion of farming activities via the agro parks and the gradual improvement of irrigation and other infrastructure to enhance the level of production
- the continuation of government programmes aimed at assisting farmers with technology, markets and loan financing. ■

MINING AND QUARRYING

INTRODUCTION

Real value added for the Mining & Quarrying industry increased by 0.9 per cent relative to 2013 (Figure 11A). The industry's share of overall GDP remained flat at 2.3 per cent. The improved performance of the industry was due to a higher production of Crude Bauxite as the production of Alumina declined (Table 11.1). The higher production of Crude Bauxite was influenced by increased global demand for alumina which was reflected in higher output at Noranda Bauxite Company. Despite an increase in the global demand for aluminium, domestic alumina production fell due to production challenges which included:

- The closure of WINDALCO's Ewarton plant for a one-week period to facilitate the unscheduled maintenance of equipment in April 2014.
- The lower quality of bauxite extracted at JAMALCO which impacted the efficiency of producing alumina as a larger volume of crude bauxite was required for conversion to one tonne of alumina.

World aluminium production increased in response to a higher demand for the commodity which was due to an expansion in the automobile and packaging industries. Consequently, world consumption of alumina and crude bauxite were also higher. This was reflected in increased

export earnings from the domestic bauxite/alumina sub-industry which was driven by higher prices.

The performance in the Industrial Minerals (Quarrying) sub-industry for 2014 also improved due to increased output by five of the eight 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. The objectives for the industry, as articulated in the Mining & Quarrying sector plan under *Vision 2030 Jamaica – National Development Plan* focus on: (i) the reinstatement of Jamaica's competitiveness in the bauxite & alumina sub-industry; and (ii) an improvement in gains from the industrial mineral sector mainly through the development of value-added products using limestone.

Legislative and policy developments for 2014 included:

- The National Minerals Policy (Draft)
- The Quarries Control Act (1984).

The National Minerals Policy (Draft) – The Ministry of Science, Technology, Energy and Mining (MSTEM) revised the National Minerals Policy (Draft) in 2014. When

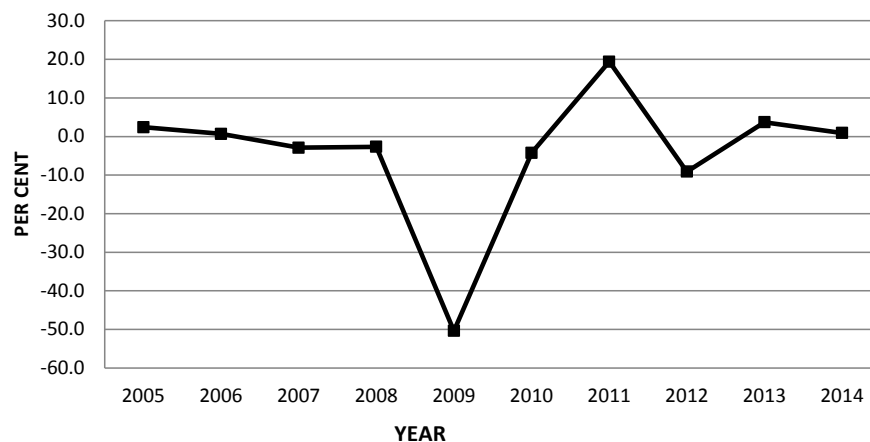


FIGURE 11A: REAL VALUE ADDED GROWTH RATE FOR MINING & QUARRYING 2005- 2014

promulgated, the draft policy will 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*. The Policy, with its accompanying implementation plan, will identify key strategies and actions to be completed within specified time horizons to address current and future challenges facing the industrial minerals sector. The document is scheduled to be tabled in Parliament in 2015 as a Green Paper.

The Quarries Control Act (1984) – A bill to amend the Quarries Control Act was considered by Parliament in October 2014 and is scheduled to be debated by the Senate in 2015. 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 2014 included:

The divestment of GoJ's Assets in the Bauxite and Alumina sub-industry – During 2014, the GoJ divested its seven per cent interest in the West Indies Alumina Company (WINDALCO) joint venture to the majority partner United Company Russian Aluminium (UC RUSAL). The company now owns 100 per cent of WINDALCO's assets.

Resuscitation and expansion of the Bauxite/Alumina sub-industry – A key GoJ goal during 2014 for the Mining and Quarrying industry was the revitalization and expansion of the bauxite/alumina sub-industry. In pursuit of this, the following were undertaken:

- The Aluminium Company of America (ALCOA) sold its 55 per cent stake in the Jamaica Alumina Company (JAMALCO) joint venture to the Noble Group.
- Negotiations with UC RUSAL led to its commitment to start mining operations in early 2015, to repair its

rail lines and port, to commence exporting up to two million tonnes of bauxite annually; and to re-open its alumina plant in Nain, St. Elizabeth.

Minerals Exploration Projects – The expansion of the bauxite and alumina sub-industry remained a key goal for 2014. Projects aimed at: establishing the viability of extracting gold; and other rare earth minerals from red mud¹ waste were conducted. The Australian company, Oz Minerals, actively pursued mineral exploration activities in Clarendon and reported promising interceptions of gold mineralization. The company is considering establishing Jamaica's second commercial gold mine in the last 20 years if further due diligence and market conditions prove positive. Nippon Light Metals concluded its pilot project which was aimed at proving the technical and financial viability of extracting rare earth minerals from red mud. A comprehensive recalculation of the country's bauxite reserves was also completed by the Jamaica Bauxite Institute (JBI).

The marketing of industrial minerals – The export of clinker to Venezuela, which started in 2013, continued in 2014 under the Trade Compensation Mechanism of the PetroCaribe Agreement.

INTERNATIONAL ENVIRONMENT

International Aluminium Market

World aluminium consumption grew by 8.0 per cent to 54 099.0 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 11.3 per cent to 37 197 kilo tonnes. Of this amount, China demanded 27 308 kilo tonnes, 14.2 per cent more than in 2013. Additionally, consumption in North America² grew by 3.4 per cent to 6 221 kilo tonnes, resulting from higher consumption volumes from all three countries, with the United States of America (USA) recording the largest increase of 4.1 per cent to 5 176.0 kilo tonnes.

In response to greater world demand of alumina, world production of aluminium increased to 53 782.0 kilo tonnes from 50 593.0 in 2013. This increase was driven by production levels in Asia where output was 36 309.0 kilo tonnes, an increase of 13.6 per cent. This growth was primarily attributed to increased production to 28 051.0 kilo tonnes by China, up 12.7 per cent. North America's production fell by 6.6 per cent to 4 593 kilo tonnes, due to declines in output from the USA, down 10.7 per cent to 1 738.0 kilo tonnes and Canada, down 3.9 per cent to 2 855 kilo tonnes. Europe's production fell by 2.9 per cent to 7 650.0 kilo tonnes.

1. Red mud is a by-product of the refining process that converts bauxite to alumina.

2. The countries included in this category are Canada, Mexico and the United States of America.

TABLE 11.1
JAMAICA BAUXITE/ALUMINA PRODUCTION AND EXPORTS
2010-2014 ('000 tonnes)

	2010	2011	2012	2013	2014 ^P	% Change	
						2013 2012	2014 2013
PRODUCTION							
Crude Bauxite (a)	4 318.8	5 112	4 770.6	4 688.3	4 818.1	-1.7	2.8
Alumina	1 590.7	1 959.9	1 757.7	1 854.9	1 851.0	5.5	-0.2
Bauxite Equivalent of Alumina (b)	4 221.1	5 076.9	4 568.7	4 746.9	4 858.6	3.9	2.4
Total Bauxite Production (c)	8 539.9	10 188.9	9 339.3	9 435.2	9 676.7	1.0	2.6
EXPORTS							
Crude Bauxite (a)	4 303.4	5 143.5	4 759.6	4 707.4	4 812.5	-1.1	2.2
Alumina	1 575.3	1 959.2	1 753.5	1 901.8	1 823.5	8.5	-4.1
Bauxite Equivalent of Alumina (b)	4 182.8	5 074.4	4 554.6	4 866.0	4 784.9	6.8	-1.7
Total Bauxite Exports (c)	8 486.3	10 217.9	9 314.3	9 573.4	9 597.4	2.8	0.3
Real Value Added Growth Rates(%) [†]	-4.2	19.1	-8.7	2.7	0.9	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

International Alumina Market

Total quantity demanded in the alumina market was 104 822 kilo tonnes, an increase of 6.3 per cent compared with 2013. This growth was driven by increased demand by China, up 12.4 per cent to 54 841 kilo tonnes. China continued to be the main consumer of alumina, accounting for 52.3 per cent of world consumption in 2014 compared with 49.5 per cent in 2013.

In response to the increased demand for alumina, world production increased by 3.0 per cent to 104 562.0 kilo tonnes. Asia continued to be the leading producer, with overall output up by 7.0 per cent to 56 545.0 kilo tonnes, of which China produced 49 665.0 kilo tonnes. Output from China represented an increase of 5.0 per cent relative to 2013. Production from North America grew by 0.7 per cent to 5 565.0 kilo tonnes while Europe recorded a 2.1 per cent decline to 8 698.0 kilo tonnes.

BAUXITE & ALUMINA SUB-INDUSTRY

DOMESTIC PRODUCTION

The local Mining industry recorded an upturn for 2014. Output of crude bauxite increased due to higher global demand for aluminium. However, ALPART and WINDALCO's Kirkvine plants remained closed since 2009, as operations at

these plants were not viable at the prevailing price of alumina given the current cost of production locally. Other factors which affected the performance of the industry included the closure of WINDALCO's Ewarton plant for an unscheduled maintenance exercise for one-week during April 2014; and lower quality bauxite which affected production of alumina at JAMALCO.

Total Bauxite

Total bauxite production increased to 9 676.7 kilo tonnes from 9 435.2 kilo tonnes in 2013 (Table 11.1). This performance reflected a higher volume of Crude Bauxite and Bauxite Equivalent of Alumina³.

Alumina

Production of alumina declined by 0.2 per cent to 1 851.0 kilo tonnes (see Table 11.1). This performance reflected a lower volume of output from JAMALCO, down 0.6 per cent to 1 276.7 kilo tonnes as production at WINDALCO's Ewarton plant increased by 0.5 per cent to 574.3 kilo tonnes. The alumina sub-industry was affected by production challenges at WINDALCO's Ewarton plant and JAMALCO which included:

- A one-week unscheduled maintenance exercise in April 2014 at WINDALCO's Ewarton plant

3. The volume of Crude Bauxite used to produce Alumina.

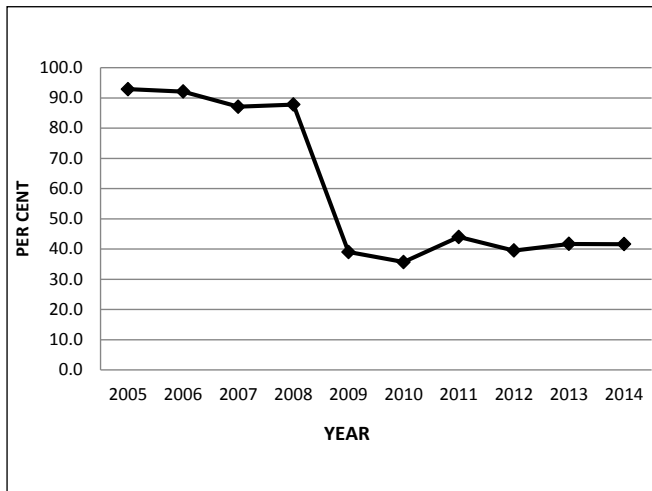


FIGURE 11B: ALUMINA CAPACITY UTILIZATION RATE

- A lower quality of bauxite which impacted efficiency at JAMALCO.

The Alumina Capacity Utilization (ACU)⁴ rate remained relatively flat at 41.6 per cent compared with 41.7 per cent in 2013. The ACU rate for WINDALCO’s Ewarton and Kirkvine plants combined was 42.5 per cent, up from 42.3 per cent in 2013. The continued closure of ALPART and WINDALCO’s Kirkvine plants constrained output for the industry. JAMALCO recorded a lower ACU rate of 88.0 per cent compared with 88.5 per cent in 2013.

Jamaica’s share of the world alumina market declined from 1.9 per cent to 1.8 per cent. This was due to an increase in global output of alumina which was compounded by the decline in Jamaica’s output of the commodity (Figure 11C).

Crude Bauxite

Production of crude bauxite at Noranda increased by 2.8 per cent to 4 818.1 kilo tonnes in response to higher global demand for alumina in 2014. This performance was reflected in the Bauxite Capacity Utilization (BCU) rate at Noranda which was 91.8 per cent compared with 89.3 per cent in 2013 (Figure 11D).

ALUMINA PRODUCTION COST

The operating cost of production per unit of alumina fell by 5.2 per cent to US\$298.5 per tonne (Table 11.2). This reflected declines in the cost of all inputs per unit of alumina production, except bauxite. The cost of fuel/energy and caustic soda per unit of alumina production fell by 7.8 per

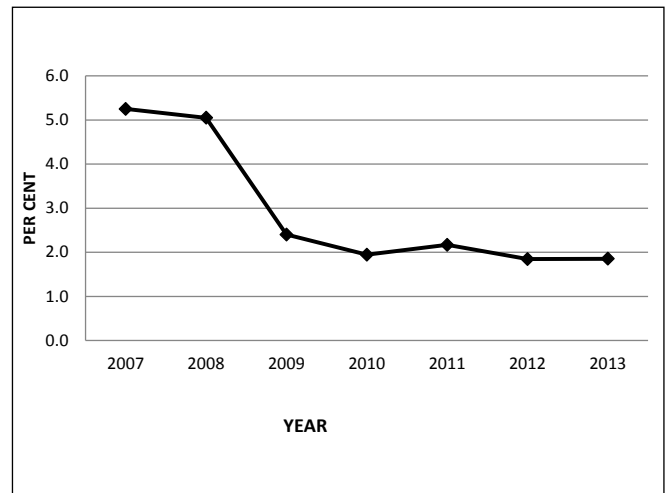


FIGURE 11C: JAMAICA’S ALUMINA PRODUCTION MARKET SHARE

cent to US\$150.8 per tonne and 6.6 per cent to US\$33.1 per tonne, respectively. However, the cost of bauxite per unit of alumina grew by 3.2 per cent to US\$22.8 per metric tonne.

EXPORTS

A higher volume of crude bauxite was exported during 2014 in response to increased global consumption of aluminium. Local alumina plants were, however, affected by production challenges which contributed to the lower volume of alumina shipped globally.

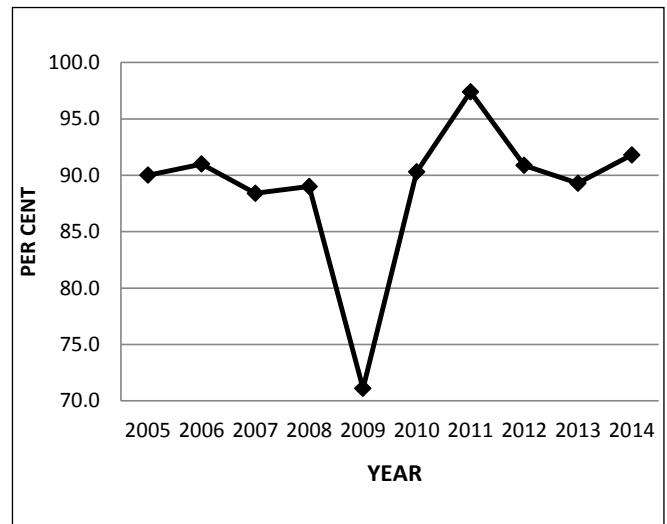


FIGURE 11D : BAUXITE CAPACITY UTILIZATION RATE

4. Alumina Capacity Utilization rate measures the percentage of productive capacity utilized in the alumina industry.

TABLE 11.2
SELECTED COSTS OF PRODUCTION PER UNIT OF ALUMINA PRODUCTION IN
THE BAUXITE/ALUMINA SUB-INDUSTRY
2010-2014 (US\$/Metric Tonne)

	2010	2011	2012	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
Bauxite	26.3	27.4	28.5	22.1	22.8	-22.4	3.2
Caustic Soda	29.2	35.9	35.8	35.4	33.1	-1.0	-6.6
Fuel/Energy	117.9	165.0	179.5	163.5	150.8	-8.9	-7.8
Labour	15.5	17.3	18.4	16.9	15.5	-8.0	-8.4
Other Operating Cost	79.2	74.0	83.6	77.1	76.3	-7.8	-1.0
Operating Cost of Production	268.0	319.6	345.8	315.0	298.5	-8.9	-5.2

p - preliminary

r - revised

Source: Compiled from data supplied by Jamaica Bauxite Institute

Total Bauxite

Total bauxite exports increased to 9 597.4 kilo tonnes which was 0.3 per cent higher than the volume exported in 2013 (see Table 11.1). This performance was due to a 2.2 per cent increase in Crude Bauxite exports to 4 812.5 kilo tonnes as exports of Bauxite Equivalent of Alumina declined by 1.7 per cent to 4 784.9 kilo tonnes.

Alumina

The exported volume of alumina declined by 4.1 per cent to 1 823.5 kilo tonnes and was due partly to production challenges at both WINDALCO's Ewarton plant and

JAMALCO during 2014. Exports to North America⁵ declined by 21.6 per cent to 651.5 kilo tonnes which reflected declines in shipments to the USA, down 96.1 per cent to 6.3 kilo tonnes; and Canada, down 3.5 kilo tonnes to 645.2 kilo tonnes. However, there was an increase in the demand for the commodity globally. This was reflected in higher exports of alumina from Jamaica to Europe, up by 34.7 kilo tonnes to 1 051.3 kilo tonnes and countries categorized as Other, up by 76.6 kilo tonnes to 107.3 kilo tonnes. Increased shipment to Europe was due to higher volumes of alumina exports to France (120.1 kilo tonnes from 31.5 kilo tonnes), Russia (up to 253.0 kilo tonnes from 90.3 kilo tonnes) and Iceland (186.2 kilo tonnes from 132.4 kilo tonnes).

TABLE 11.3
TOTAL VALUE OF EXPORTS & FOREIGN EXCHANGE EARNINGS
2010-2014 (US\$ MILLION)

	2010	2011	2012	2013	2014	% change	
						2013 2012	2014 2013
Crude Bauxite	128.7	147.8	142.5	128.3	131.1	-10.0	2.2
Alumina	404.7	591.8	480.4	516.3	542.4	7.5	5.0
Total Export Value	533.4	739.5	622.9	644.6	673.5	3.5	4.5
Total Tax Receipts-(b)	13.1	20.6	15.1	12.3	10.0	-18.5	-18.7
Income Tax	10.0	4.0	0.0	0.0	0.0	0.0	0.0
Bauxite Levy	3.1	16.6	15.1	12.3	10.0	-18.5	-18.7
Royalty (c)	3.7	2.7	4.6	4.7	4.6	2.2	-2.1
Local Cost & Net Forex (d)	278.6	294.7	230.0	337.2	260.3	46.6	-22.8
Foreign Exchange Inflows (a)	295.4	318.1	249.1	354.2	275.0	42.2	-22.4

r - revised

p - preliminary

(a) = (b) + (c) + (d)

Source: Compiled from data supplied by Jamaica Bauxite Institute

5. North America refers to the United States of America and Canada.

TABLE 11.4
PRODUCTION OF INDUSTRIAL MINERALS
2010-2014 ('000 tonnes)

	2010	2011	2012 ^r	2013	2014 ^p	% change	
						2013 2012	2014 2013
Silica Sand	13.0	14.0	13.9	15.8	15.8	13.8	0.0
Limestone	1 956.1	2 451.0	2 232.6	1 949.4	2 138.0	-12.7	9.7
Gypsum	147.1	79.5	64.8	48.3	45.2	-25.4	-6.5
Marble	0.1	0.1	0.1	0.1	0.1	-4.0	-16.7
Sand and Gravel	2750.0	2 475.2	2 599.0	1 902.4	2 118.0	-26.8	11.3
Marl & Fill	2 155.0	1 140.2	1 197.3	1 197.6	10 311.8	0.0	761.0
Pozzolan	139.5	130.4	107.2	112.3	129.2	4.8	15.0
Shale	202.3	226.9	250.5	205.3	308.1	-18.1	50.1
Clay	5.0	4.2	300.6	12.0	34.2	-96.0	185.0

r - revised

p - preliminary

Discrepancies due to rounding

Source: Mines and Geology Division

Crude Bauxite

Exports of Crude Bauxite grew by 2.2 per cent to 4 812.5 kilo tonnes which was attributed to the higher demand for the commodity globally.

EARNINGS

The total value of exports for bauxite and alumina amounted to US\$673.5 million representing an upturn of 4.5 per cent relative to 2013 (Table 11.3). This performance was influenced by increases in the values of export for alumina, up 5.0 per cent to US\$542.4 million and crude bauxite, up 2.2 per cent to US\$131.1 million. The growth in alumina earnings was attributed to a 9.6 per cent increase to US\$297.43 per tonne in the average export price of the commodity as the exported volume declined by 4.1 per cent. Crude bauxite earnings was influenced by the increase in the volume exported, up 2.2 per cent to 4 812.5 kilo tonnes as the average export price remained flat at US\$27.25 per tonne.

Total foreign exchange inflows fell from US\$354.2 million to US\$275.0 million in 2014. The amount remitted to cover local costs declined by US\$76.9 million to US\$260.3 million and bauxite levy fell by US\$2.3 million to US\$10.0 million.

INDUSTRIAL MINERALS SUB-INDUSTRY (QUARRYING)

There was an improvement in the performance of the Industrial Minerals (Quarrying) sub-industry for 2014 due to growth in the Construction industry where several of these materials are used as inputs (Table 11.4).

Silica Sand

The production of silica sand in 2014 amounted to 15.8 kilo tonnes, the same as in 2013. Silica sand is used primarily in the production of thin set which is used in construction activities (see Table 11.4).

Limestone & Whiting

Limestone & Whiting production totalled 2 138.0 kilo tonnes, an increase of 9.7 per cent compared with 2013. The higher level of output for limestone was attributed to the upturn in the Construction industry. The material is widely used in the production of cement as well as in the conversion of bauxite to alumina. Whiting which is obtained from the processing of high purity limestone grew in response to the increased demand for the commodity internationally.

Gypsum

The volume of gypsum production was 45.2 kilo tonnes, representing a decline of 6.5 per cent compared with 2013. This was due to the limited reserves at mines that are currently in operation.

Marble

The total production of marble declined from 120 tonnes to 100 tonnes. The production of this material continued to be severely curtailed by high production costs and competition from imported marble and ceramic products.

Sand and Gravel

The production of sand and gravel grew by 11.3 per cent to 2118.0 kilo tonnes. This performance was due largely to the increase in road improvement projects.

Marl and Fill

Production of marl and fill was 10 311.8 kilo tonnes compared with 1 197.6 kilo tonnes in 2013. This was associated with the improved performance of the Construction industry.

Pozzolan and Shale

There were increases in the production of pozzolan, up 15.0 per cent to 129.2 kilo tonnes and shale, up 50.1 per cent

to 308.1 kilo tonnes. Both minerals are key inputs used in the production of Portland cement.

Clay

The production of clay grew to 34.2 kilo tonnes from 12.0 kilo tonnes in 2013. This performance was attributed to the use of the material in a dyke reconstruction project associated with the Mining sub-industry.

EMPLOYMENT

For 2014, average employment in the Mining & Quarrying industry grew by 13.9 per cent to 6 150 persons and represented 0.5 per cent of the average total employed labour force, the same as in 2013. The employed labour force in the industry constituted an average of 5 425 males and 725 females which represented increases of 10.7 per cent and 45.0 per cent, respectively.

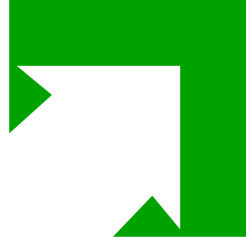
OUTLOOK

Real value added for the Mining & Quarrying industry is expected to increase during 2015. This improvement is based on the demand for aluminium which will be generated

from the growing automobile and packaging industries in China and the USA. 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 industry will also benefit from the re-opening of Alpart bauxite mining operations in 2015.

The Quarry sub-industry is also expected to increase its output during 2015. This is predicated on an increase in demand for quarry materials in the ongoing programme to rehabilitate several main and arterial roads throughout Jamaica. These include work which will continue on the North-South link of Highway 2000 from Caymanas, St. Catherine, to Ocho Rios, St. Ann, and the development of road infrastructure from Port Antonio, Portland, to Harbour View, St. Andrew.

The near exhaustion of gypsum at sites necessitated exploration for new sources which were identified in 2014. It is, therefore, expected that increased volume of the mineral will be extracted for local consumption and export in 2015. ■



MANUFACTURE

INTRODUCTION

The Manufacture industry was guided by policies and programmes of the Ministry of Industry, Investment & Commerce (MIIC) which were geared towards training and development, particularly on compliance with international standards; marketing and promotional activities; strengthening of legislation to enhance the competitiveness of local products; and the provision of financing to facilitate the modernisation of equipment. Another major development during the year was the implementation of initiatives to expand the linkages between the Manufacture industry and the Tourism sector.

Real value added for the Manufacture industry contracted by 1.2 per cent and accounted for 8.3 per cent of Gross Domestic Product for 2014 (Figure 12A). This resulted from a decline in the Other Manufacture sub-industry, while the Food, Beverages & Tobacco sub-industry grew. The performance of the industry was adversely impacted by lower demand for several products due partly to the weak economic environment locally and the closure of some plants. Additionally, there was exchange rate depreciation, which affected some manufacturers positively by increasing the competitiveness of products for the domestic market and exports, but negatively for others by increasing the cost of productive inputs. There was also higher production of some commodities which partly reflected growth in related industries such as Construction.

The value of manufactured exports was US\$680.4 million, a reduction of US\$113.5 million in earnings relative to 2013.

The lower earnings was reflective of declines in Traditional Exports and Non-Traditional Exports of US\$1.1 million and US\$112.4 million, respectively.

POLICY & PROGRAMMES

National Policy Framework

The MIIC’s policy efforts were focused on enhancing the business environment for the operation of firms; strengthening the capacity of the sector to capitalize on opportunities from investments such as the Logistics Hub Initiative as well as regional and international trade agreements; expanding exports and diversifying markets; and improving the productivity and overall competitiveness of manufacturing firms. These efforts were aligned with the Government of Jamaica’s (GoJ’s) vision and development priorities for Jamaica; the Micro, Small and Medium-Sized Enterprises (MSMEs) and Entrepreneurial Policy; and the country’s Growth Agenda.

Business Environment

Following significant reforms in business procedures and legislation as well as the introduction of a new tax system, Jamaica’s performance in important global surveys improved. In the Doing Business Report 2015, Jamaica ranked 58 out of 189 countries, moving up 27 places. For the Global Competitiveness Report (GCR) 2014/15, Jamaica ranked 86 out of 144 countries compared with 94 out of 148 countries in the GCR 2013/14. In the Logistics Performance Index, Jamaica moved up 54 places to 70. Further reforms anchored

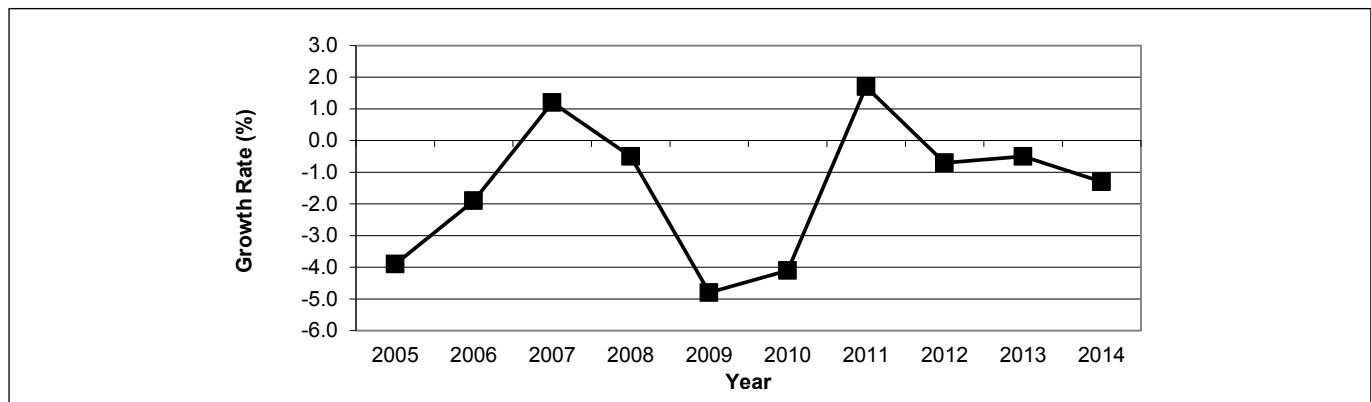


FIGURE 12A: CHANGE IN REAL VALUE ADDED FOR THE MANUFACTURE INDUSTRY, 2005–2014

by national competitiveness will be undertaken to provide regulatory support for the business environment.

With regard to tax incentives, a system designed for the productive sector was implemented. There were some challenges in the initial stages, but through collaboration and negotiations, further concessions to the productive sector were agreed. Namely, there were a 50.0 per cent reduction on the Customs Administration Fee for raw materials intermediate and packaging goods; and a deferment of General Consumption Tax (GCT) payment on imported inputs.

Negotiations continued with the Incentives Working Group regarding the treatment of GCT on local purchases and the environmental levy and how these will impact the Manufacture industry. Discussions were also being finalized with the Ministry of Agriculture, Forestry & Fishing towards a new sugar import regime and the facilitation of the productive sector in this process.

Institutional Support and Capacity Building

Institutional support and capacity building efforts were continued by the various arms of government including Customs; the Tax Administration Department; and MIIC and its agencies; particularly, Jamaica Promotions Corporation (JAMPRO), Jamaica Business Development Corporation (JBDC), Bureau of Standards Jamaica (BSJ), Anti-Dumping and Subsidies Commission and the Jamaica Intellectual Property Office. Consultation and sensitization sessions by the MIIC were conducted with the business community. These were centred on the Logistics Hub Project and the rationale for a logistics-centred economy and approach to meet the development demands and opportunities of the project.

Linkages between Manufacture and Tourism were established during the year, with the Tourism Linkages Committee fostering the purchase of locally produced items such as furniture, agro-processing products and other items needed by tourism interests. Clusters, especially in furniture and agro-processing, were encouraged in order to reduce costs, increase competitiveness and promote greater business linkages particularly with the Special Economic Zones (SEZs) when they are established.

Newly implemented legislation such as Secured Interest in Personal Property will facilitate easier access to finance for the Manufacture industry. The recently promulgated Insolvency Legislation will also accommodate the re-entry of failed businesses to resume operations and access financing, subject to agreed conditions. Limestone, bamboo, medical hemp and nutraceuticals were some of the new products targeted for development. Capacity building efforts for these subindustries were advanced during the year and a policy regulatory framework will be promoted.

National Competitive Council (NCC)

The NCC is a public-private partnership established in 2010 to enhance policy advocacy, research and public awareness of reform initiatives that facilitate the creation of an enabling business environment for Jamaica. The work of

the Council is managed through JAMPRO while the MIIC is responsible for policy guidance and leadership. During 2014, the achievements of the Business Environment Reform Agenda of the NCC included: (i) implementation of a single registration form for businesses in January; (ii) introduction of a new SO3 form for self-employed persons during February; (iii) implementation of an electronic interface between the Companies Office of Jamaica and Tax Administration Jamaica in March; (iv) establishment of a venture capital programme during September; and (v) introduction of a Single Return Form (SO4) for self-employed persons in December. The NCC was also responsible for the establishment of the National Export Strategy (NES).

National Export Strategy (NES)

The main objective of the NES is to enhance Jamaica's exports to the global economy by focusing on specific cross-cutting industry strategies and priority industry initiatives. In 2009, the first phase of the NES was developed with an implementation period spanning from April 2010 to March 2013. During 2013, a review of the first phase was conducted. The results showed that approximately 63.0 per cent of a total of 325 initiatives were implemented, where 28.6 per cent was cross-cutting and 71.4 per cent was priority. Phase II of the NES aims to build upon the progress made in Phase I with programmes designed to maximise the contribution of exports to the economy. Validation consultations were held in March 2014, after which a strategic review meeting among NES partners was held during the following month. The main findings of the Phase I review of the NES was presented to stakeholders during the validation consultations. Further consultations were held during the latter half of 2014, while consultants were hired in November to develop the draft plan for Phase II of the NES.

Bureau of Standards Jamaica (BSJ)

During 2014, the BSJ published 27 product standards and codes of practice, the majority 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. The BSJ also offered 36 training and development courses throughout the year. These included Good Manufacturing Practices; Documentation & Process Mapping; Hazard Analysis Critical Control Points (HACCP) General Awareness; Introduction to Project Management; and the International Organization for Standardization's standards in several areas. The food processing sub-industry benefited from most of the initiatives undertaken by the BSJ. The key areas of focus included:

- Awareness Sessions on the new standard for Bag Drink during March in Mandeville and Montego Bay. The sessions were primarily geared at introducing the standard and soliciting comments or concerns from food processors and other stakeholders.
- Awareness Sessions on the revised standard for the manufacture of bread were held during October and

November in Kingston, Mandeville and Montego Bay. The target audience was small and medium-sized bakeries. The standard had been revised because of concerns from consumers regarding the labelling declarations made by manufacturers of bread.

- Participation in the Denbigh Agricultural, Industrial and Food Show during August in May Pen with the theme “Grow what we eat, eat what we grow”. The BSJ’s areas of focus included: Bamboo Products Industry Project, Jamaica Made Mark Programme¹ and the HACCP Recognition Programme. The BSJ also displayed several certified products, many of which were from small and medium-sized enterprises.
- Support of the Mobile Business Clinic Initiative, which is coordinated by the Jamaica Business Development Corporation (JBDC). The BSJ participated in the Business Wheel Clinic and Panel Discussion “Getting Ready for the Global Marketplace” during November in Montego Bay. The BSJ presented on its role in regulating and facilitating the processed food industry.

USA’s Food Safety Modernization Act 2011: During the review period, the National Food Safety Modernization Secretariat facilitated several activities geared towards capacity building. Food safety training was administered by the BSJ on behalf of the Food & Drug Administration. The BSJ supervised a Better Process Control School (BPCS) conducted by the University of the West Indies in January. The BPCS is a certification course for supervisors of the processing operations in factories which process low acid and acidified foods (e.g. canned ackee, calaloo, and sauces). A total of 30 persons were trained and all were successful. The Caribbean Development Bank(CDB)/Caribbean Technological Consultancy Services (CTCS) indicated its intention to provide financial assistance to implement a project titled “Caribbean Development Capacity Building in Jamaican MSMEs in the Agro-Processing Sector” to satisfy international food safety requirements. The project is a collaborative initiative between the CDB/CTCS and the BSJ and is aimed at developing a cadre of competent workers to implement food safety systems in 14 food processing facilities. Implementation is scheduled for the first quarter of 2015.

Nine food tests conducted by the BSJ’s Chemistry Laboratory for foods manufactured for local and international trade were accredited by the Jamaica National Agency for Accreditation. The accreditation of these tests was a critical step to maintaining access to the markets of our existing trading partners and in gaining entry to new markets. A stipulation of the FSMA is that specified food products entering the United States of America will have to be tested by an accredited laboratory at an effective date to be announced.

Jamaica Teas Limited attained certification for their teas which had 12 flavours and Red Stripe Diageo attained certification for four products, three types of beer and a malt beverage under the Jamaica Made Mark Programme. Certification under this programme signifies that they are authentic Jamaican products which conform to the required standards.

The implementation of the Bamboo Products Industry Project, which is aimed at creating standards for the bamboo industry, continued during 2014. The main activities included: (i) the passing of a private members’ motion in the Senate during January; (ii) the exemption of bamboo charcoal from the ban on the export of charcoal by the Ministry of Water, Land, Environment and Climate Change; (iii) staging of the inaugural National Bamboo Forum in April; (iv) the establishment of a bamboo theme park and trail as a tourist attraction in Hanover during May; (v) development of two prototypes (charcoal water filter and vase); and (vi) the display of bamboo products at the Denbigh Agricultural, Industrial and Food Show in August. Additionally, Nelson’s Superfarm in St Mary was certified in November by the United States Department of Agriculture to produce organic bamboo, while the first bamboo charcoal kiln was installed at the same facility in October.

Jamaica Manufacturers’ Association (JMA)

The JMA continued to support the Manufacture industry during 2014 by facilitating activities that were aimed at improving sales through increased production and exports. Notably, the JMA had two main strategic objectives. The first was to ensure that the tax reform initiatives enabled manufacturers to compete locally and internationally and the second involved the strengthening of linkages between the Manufacture industry and the Tourism sector. With respect to exports, the JMA undertook three missions in March, April and September to the Caribbean and Latin America to explore opportunities for its members. These missions were funded by the European Union’s Economic Partnership Agreement Capacity Building Project. The JMA’s membership for 2014 was 360 companies relative to 341 companies in 2013.

Manufacture Linkages: This formed part of the overall strategy of the JMA in promoting business development and inter-sectoral relations to enhance information sharing and networking. The JMA is a key stakeholder and member of the Tourism Linkages Council and the Tourism-Manufacturing Technical Working Group which were established in 2013. The JMA, in partnership with the Jamaica Promotions Corporation (JAMPRO) and the Jamaica Business Development Corporation (JBDC), coordinated the representation of manufacturers at the following events to strengthen the linkages with the Tourism sector:

1. This is a voluntary conformity assessment programme, which serves to: create a significant competitive advantage for authentic Jamaican products; strengthen consumer confidence in the authenticity and quality of Jamaican products locally and internationally; and provide economic benefits to manufacturers.

- Caribbean Hotel and Tourism Association’s Caribbean Travel Market
- Jamaica Product Exchange (JAPEX)
- Farmers’ Markets
- In-Hotel Suppliers’ Displays.

Marketing & Promotions: The JMA, in collaboration with the National Commercial Bank, continued its “Buy Jamaican, Build Jamaica” promotion through a public education campaign. This promotion was advertised via television, print and radio.

Partnerships: The JMA continued to work with the University of the West Indies (UWI) under the MOU signed in 2013. In 2014, the baseline study to assess the state of the Manufacture industry was commissioned, with the aim of identifying gaps and developing strategies to effectively support the sector. The partnership with the BSJ also continued with members receiving training in the areas of Good Manufacturing Practice, Auditing and Developing a Quality Manual. The JMA also formed a partnership with the Development Bank of Jamaica to undertake a project—“Improve the Access to Financing”—to assist MSMEs. The project is scheduled for completion in 2015. The JMA also executed its biennial Expo Jamaica in collaboration with the Jamaica Exporters’ Association. The event was used as a platform for buyers and sellers (local and international) to do business, as well as strengthen linkages with the Tourism and Agricultural sectors as the show was expanded to include Experience Jamaica and the Farmers’ Market. In addition, the JMA in partnership with JAMPRO, conducted a training workshop on Exporting to Panama.

Grant Funding and Product Development: Manufacturers utilised grants available under the Direct Assistance Grant Scheme from the Caribbean Export Development Agency. Manufacturers also received grant assistance for Equipment Modernization, Packaging & Product and Service Development for up to €30,000. Through increased research and development, 13 new products were developed by members of the JMA. These included agro-processed goods, furniture and electrical tools.

Jamaica Exporters’ Association (JEA)

The JEA’s primary mandate is to advance national development through exports. Consequently, the Association facilitated financing solutions for four companies and hosted training programmes during 2014. The training programmes included workshops on: (i) Capacity Building; Business Potential for Herbal Nutraceutical Products; Food Safety & Traceability; Creating Opportunities Through Value Added Products; and Issues Exporting to Canada.

INVESTMENT

Expansion and New Investment in Manufacture

During 2014, JAMPRO facilitated the implementation of investment projects for the Manufacture industry. The projects

reflected the Government of Jamaica’s focus on stimulating investments in potential growth sectors. The Manufacture industry accounted for 7.0 per cent (\$759.0 million) of total capital expenditure. Notably, GulfRay Americas Manufacturing Limited, which opened in 2013 as the nation’s first blender of lubricants, fuels and petrochemicals, invested in equipment which was used to facilitate operations during 2014. There were also investments by two major production companies amounting to approximately \$2.8 billion during the year. These investments were associated with import substitution for one company and plant upgrade and expansion for the other. Additionally, a number of manufacturers sought new areas for investment during 2014. SKDP Haulage sold recycled old tyres to the local and international markets by crushing them into small particles. The local market used this material for construction and other activities. Caribbean Label Craft established a manufacturing plant to supply the labelling needs of domestic producers across the island.

PERFORMANCE

Production

The estimated contraction in real value added for the Manufacture industry resulted from a decline of 3.7 per cent in the **Other Manufacture** sub-industry. This was due to a projected decrease during July–December 2014, as growth was recorded for the first six months. In contrast, the **Food, Beverages & Tobacco** sub-industry grew by 0.7 per cent during 2014. This improvement reflected respective increases during January–June and July–December of 2014.

Other Manufacture

Chemicals & Chemical Products

This category declined during 2014 and was attributed to reduced demand. Nine commodities were surveyed in this category, with three continuing to report no production in 2014. The products registering the largest declines were Paint (down 8.4 per cent to 8 612 tonnes); Fertiliser (down 1.2 per cent to 26 722 tonnes); and Aluminium Sulphate (down 13.2 per cent to 1 736 tonnes). The production of Salt remained relatively flat at 14 169 tonnes. There was no production of ethanol during 2014 compared with production for only January–March of 2013. The lack of production of ethanol continued to be affected by the increasing price of sugar from Brazil—the source market for inputs—and the decreasing price of corn in the USA, the destination market.

Petroleum Products

There was a contraction in the gross output for the Petroleum Products category during 2014. This decline reflected lower production in all quarters except April–June 2104. The contraction in production for Petroleum Products was due to the closure of the refinery during September 2014 and the partial closures during August and October. The declines recorded for the product groups were:

- Fuel Oil, down 17.3 per cent to 613 929 kilo tonnes
- Automotive Diesel Oil, down 23.5 per cent to 149 287 kilo tonnes

- Gasolene, down 16.6 per cent to 139 369 kilo tonnes
- Turbo Fuel, down 16.8 per cent to 100 848 kilo tonnes
- Other Petroleum Products, down 16.4 per cent to 37 223 kilo tonnes
- Liquid Petroleum Gas, down 5.2 per cent to 10 374 kilo tonnes.

Non-Metallic Minerals and Plastics

Production of Non-Metallic Minerals grew, with cement production increasing by 0.6 per cent to 830 061 tonnes in 2014 (see Table 12.1). Additionally, clinker production rose by 14.2 per cent to 795 041 tonnes. The growth in cement production was pushed by higher demand, both locally and overseas. Notably, there were increased construction activities in the domestic economy and improved conditions globally, which facilitated more exports. The output of Plastic

TABLE 12.1
OUTPUT OF SELECTED MANUFACTURED COMMODITIES 2010–2014

FOOD BEVERAGES & TOBACCO	UNIT	2010	2011	2012	2013 ^r	2014 ^p	% Change	
							2013/ 2012	2014/ 2013
Food Processing								
Poultry Meat	tonnes	104 203	101 165	101 509	103 263	109 833	1.7	6.4
Animal Feeds	tonnes	381 431	402 201	408 139	401 241	397 390	-1.7	-1.0
Condensed Milk	tonnes	10 514	10 293	8 412	7 241	6 288	-13.9	-13.2
Edible Oils	tonnes	21 712	21 266	21 102	19 027	20 611	-9.8	8.3
Edible Fats	tonnes	6 517	7 047	6 903	6 458	5 884	-6.4	-8.9
Flour	tonnes	136 798	134 510	136 132	136 702	132 156	0.4	-3.3
Cornmeal	tonnes	6 343	5 128	6 318	6 478	6 879	2.5	6.2
Sugar	tonnes	121 034	143 195	136 645	121 138	149 066	-11.3	23.1
Molasses	tonnes	56 412	63 664	58 870	42 923	68 892	-27.1	60.5
Dairy Products	tonnes	4 387	3 864	3 648	3 832	3 619	5.0	-5.5
Beverages & Tobacco								
Alcohol (incl. rum)	'000 ltrs	18 494	19 367	22 747	25 239	20 610	11.0	-18.3
Beer & Stout	'000 ltrs	65 516	58 343	50 226	41 868	46 075	-16.6	10.0
Beer	'000 ltrs	53 203	46 400	38 359	28 138	30 733	-26.6	9.2
Stout	'000 ltrs	12 313	11 943	11 867	13 730	15 341	15.7	11.7
Carbonated Beverages	'000 ltrs	9 337	11 101	11 461	11 837	12 176	3.3	2.9
OTHER MANUFACTURING								
Chemicals & Chemical Products								
Acetylene	cu.mtrs	91 229	89 093	n/a	n/a	n/a	-	-
Sulphuric Acid	tonnes	5 469	6 928	1 010	0	0	-100.0	-
Aluminium Sulphate	tonnes	4 278	6 920	5 955	2 001	1 736	-66.4	-13.2
Sulphonic Acid	tonnes	3 875	4 381	1 009	0	0	-100.0	-
Salt (NaCl)	tonnes	14 232	14 001	14 587	14 166	14 169	-2.9	0.0
Fertiliser	tonnes	27 945	33 286	23 327	27 046	26 722	15.9	-1.2
Detergent	tonnes	392	367	387	0	0	-100.0	-
Paint	'000 ltrs	9 249	9 765	9 479	9 401	8 612	-0.8	-8.4
Petroleum Products								
Gasolene	'000 ltrs	168 708	194 325	180 340	167 146	139 369	-7.3	-16.6
LPG	'000 ltrs	13 974	19 606	16 884	10 941	10 374	-35.2	-5.2
Fuel Oil	'000 ltrs	750 752	767 273	729 306	742 477	613 929	1.8	-17.3
Turbo Fuel	'000 ltrs	124 321	114 771	120 011	121 270	100 848	1.0	-16.8
Automotive Diesel Oil	'000 ltrs	200 237	220 549	238 274	195 179	149 287	-18.1	-23.5
Other Petroleum Products	'000 ltrs	37 141	46 263	43 733	44 513	37 223	1.8	-16.4
Non Metallic Minerals								
Cement	tonnes	723 489	766 274	760 296	824 828	830 061	8.5	0.6
Clinker	tonnes	n/a	n/a	n/a	696 076	795 041	-100.0	14.2
Plastic Products								
Other Plastic Products ^a	tonnes	10 270	10 663	13 549	12 810	12 445	-5.5	-2.8

a - includes PET bottles

r - revised

p - preliminary

n/a - not available

Source: Survey conducted by the PIOJ

Products decreased by 2.8 per cent to 12 445 tonnes in 2014. The products with the largest declines in production were:

- 10 Ounce Juice Bottle, down 46.6 per cent to 439 139 tonnes
- Half Gallon Bottle, down 57.6 per cent to 118 987 tonnes
- 1 Litre Handle Bottle, down 20.9 per cent to 411 946 tonnes
- Round Gallon Bottle, down 6.0 per cent to 1 234 730 tonnes.

Food Beverages & Tobacco

Food Processing

The Food Processing component was estimated to have increased due to higher production for most commodities. Sugar and Molasses, which are heavily weighted in this component, were the main contributors to the increase. There were respective increases of 23.1 per cent and 60.5 per cent in the production of Sugar and Molasses, reflecting largely higher output of sugar cane (see Table 12.1). The other commodities that registered increased production were: Poultry Meat (up 6.4 per cent to 109 833 tonnes); Edible Oils (up 8.3 per cent to 20 611 tonnes); and Cornmeal (up 6.2 per cent to 6 879 tonnes). However, the commodities that recorded the largest declines were: Flour (down 3.3 per cent to 132 156 tonnes); Animal Feeds (down 1.0 per cent to 397 390 tonnes); and Condensed Milk (down 13.2 per cent to 6 288 tonnes) {see Table 12.1}.

Beverages & Tobacco

The Beverages & Tobacco component was estimated to have increased. Two of the three subcategories, Beer & Stout and Carbonated Beverages, registered higher production volumes for 2014. Beer & Stout recorded an increase of 10.0 per cent due partly to the increased demand for flavoured beers introduced by a major producer during the year (see Table 12.1). This was reflected in higher production for all quarters, except for January–March 2014. With respect to Carbonated Beverages, there was an increase of 2.9 per cent. For Rum & Alcohol, there was an 18.3 per cent decline in production relative to 2013. This downturn emanated from a reduction in factory operations during the year. One plant was closed for repair and maintenance, which resulted in only six weeks of operation during the last quarter of 2014. Another plant was impacted adversely by waste management challenges,

which resulted in the closure for an additional month relative to 2013.

Producer Price Index² (PPI)

Producer prices within the Manufacture industry grew by 2.7 per cent for 2014. This increase was reflected through the higher cost of raw materials, which was associated mainly with the depreciation of the Jamaica Dollar against the major internationally-traded currencies. The Food, Beverages & Tobacco's index increased by 8.6 per cent and reflected higher indices for all subgroups. Increases were registered for:

- *Production, Processing & Preserving of Meats, Fish, Vegetables, Oils & Fats* – up 7.1 per cent
- *Manufacture of Dairy Products* – up 13.2 per cent
- *Manufacture of Grain Mill Products, Starches & Starch Products* – up 4.1 per cent
- *Manufacture of Other Food Groups* – up 12.3 per cent
- *Manufacture of Beverages & Tobacco* – up 6.7 per cent.

Among the other major groups in the industry, Rubber & Plastic Products (up 19.5 per cent) and Fabricated Metal Products excluding Machinery & Equipment (up 12.4 per cent) registered the largest increases in their indices. Both increases were associated with the depreciation in the exchange rate. With regard to Refined Petroleum Products, the index declined by 23.1 per cent and was influenced by the lower price of crude oil on the international market³.

Exports

For 2014, earnings from manufactured exports was US\$680.4 million, 14.3 per cent lower than the total in 2013. This reflected reduced earnings for both Traditional and Non-Traditional Exports (Table 12.2). There was a decline of 1.0 per cent to US\$104.7 million in the value of Traditional Manufactured Exports which was attributed to decreased earnings from all categories, with the exception of Sugar. Earnings from the exports of Rum and Other Products fell by 7.2 per cent to US\$44.7 million and 5.4 per cent to US\$4.1 million, respectively (see Table 12.2). The value of Sugar exports rose by 4.9 per cent to US\$55.8 million.

The value of Non-Traditional Manufactured Exports was US\$575.8 million compared with US\$688.2 million in 2013. This decline was due to lower export earnings for five of the nine categories. The Chemicals⁴ and Mineral Fuels categories accounted for the largest absolute decreases of US\$85.3

2. 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 taxes, suppliers' retail and wholesale margins and separately invoiced transport and insurance charges.
3. Global crude oil averaged US\$96.24 per barrel in 2014, a decline of 7.5 per cent relative to 2013.
4. This includes ethanol exports.

TABLE 12.2
TOTAL EXPORTS FROM THE MANUFACTURE INDUSTRY, 2010–2014
US\$(000)

TRADITIONAL	2010	2011	2012 ^r	2013 ^r	2014 ^p	% Change 2014/2013
Sugar	44 243	62 164	94 138	53 158	55 784	4.9
Other Products	5 964	3 341	5 702	4 385	4 149	-5.4
Rum	47 197	48 706	55 654	48 178	44 725	-7.2
TOTAL TRADITIONAL EXPORTS	97 404	114 211	154 905	105 721	104 658	-1.0
NON-TRADITIONAL						
Processed Foods	82 613	94 771	114 898	121 298	122 039	0.6
Beverages & Tobacco (excluding Rum)	56 300	64 453	48 212	34 984	35 115	0.4
Crude Materials	22 929	44 816	26 450	33 684	39 396	17.0
Mineral Fuels	291 209	371 763	387 742	351 223	307 349	-12.5
Animal & Vegetable Oils & Fats	162	271.0	144	373	336	-9.9
Chemicals (including Ethanol)	78 695	41 086	223 895	108 324	23 037	-78.7
Manufactured Goods	11 334	4 555	4 273	24 413	36 205	48.3
Machinery & Transport Equipment	512	8	401	3 198	2 449	-23.4
Other	12 033	10 176	9 841	10 710	9 833	-8.2
TOTAL NON-TRADITIONAL EXPORTS	555 274	631 899	784 019	688 207	575 759	-16.3
TOTAL EXPORTS	646 723	746 110	938 924	793 928	680 417	-14.3

r - revised

p - preliminary

Source: Compiled from data supplied by STATIN

million to US\$23.0 million and US\$43.9 million to US\$307.3 million, respectively. The lower out-turn for Chemicals was due mainly to no ethanol exports during 2014. The reduced value of Mineral Fuels exports reflected the lower price of crude oil on the global market. The other commodities that recorded declines were Animal & Vegetable Oils & Fats (9.9 per cent); Machinery & Transport Equipment (23.4 per cent); and Other (8.2 per cent). Among the categories registering increases, Manufactured Goods (up 48.3 per cent to US\$36.2 million) and Crude Materials (up 17.0 per cent to US\$39.4 million) had the largest movements (see Table 12.2). The higher export of cement was the main contributor to the increased out-turn for Manufactured Goods. Within the Crude Materials category, there were increased export earnings for all commodities, with the exception of Other Crude Materials. The major commodity in the category, Waste and Scrap Metal, grew by 26.8 per cent to US\$33.8 million, reflecting the removal of the exportation ban on the product during 2013. Limestone, the other commodity in the Crude Materials category, rose by 13.9 per cent to US\$2.9 million. The Processed Foods and Beverages & Tobacco (excluding Rum) categories increased by 0.6 per cent to US\$122.0 million and 0.4 per cent to US\$35.1 million, respectively.

Employment

Average employment in the Manufacture industry increased to 72 900 persons compared with 71 850 persons in 2013. The share of employment in the Manufacture industry

of the total employed labour force was 6.5 per cent, similar to the out-turn for 2013. The higher average employment reflected increases in the number of males and females employed. The average number of males employed in the industry was 49 025 compared with 48 700 persons for 2013. The average number of females employed was 23 875, an increase of 725 persons relative to 2013.

FINANCING TO THE INDUSTRY

Loans & Advances to the Industry

At the end of 2014, the stock of Outstanding Loans & Advances to the Manufacture industry held by deposit-taking institutions was \$13 060.6 million, 0.7 per cent higher than at the end of 2013. This out-turn resulted from increases in the stocks of Outstanding Loans & Advances at both Commercial Banks and Financial Institutions Act (FIA) Licensees.

Commercial Banks

At the end of 2014, the stock of Loans & Advances to the Manufacture industry outstanding at commercial banks was \$12 679.0 million, 0.6 per cent more than at the end of 2013 (Table 12.3). The stock of Loans & Advances outstanding at the end of 2013 was \$12 608.8 million, 4.5 per cent higher than the stock at the end of 2012. The increase in loan stock at the end of 2014 reflected higher loan balances for four of the nine categories. The categories with higher outstanding loan balances were:

TABLE 12.3
OUTSTANDING LOANS AND ADVANCES TO THE MANUFACTURE INDUSTRY BY COMMERCIAL BANKS, 2010–2014
\$000

Categories	2010	2011	2012	2013	2014	% Change	
						2013/ 2012	2014/ 2013
Sugar, Rum & Molasses	112 238	233 324	1 871 640	752 464	354 010	-59.8	-53.0
Food, Drink, & Tobacco	1 912 513	1 954 979	4 333 708	5 380 108	5 991 986	24.1	11.4
Paper, Printing & Publishing	128 022	116 819	168 266	267 076	346 355	58.7	29.7
Textile, Leather & Footwear	134 235	166 996	201 571	192 755	164 833	-4.4	-14.5
Furniture, Fixture & Wood Products	648 167	647 682	474 405	529 578	642 190	11.6	21.3
Metal Products	379 154	237 634	228 327	214 530	151 231	-6.0	-29.5
Cement & Clay Products	1 087 646	981 037	884 134	941 606	593 449	6.5	-37.0
Chemicals & Chemical Products	648 803	374 787	819 764	647 356	577 259	-21.0	-10.8
Other	3 245 322	3 058 036	3 081 236	3 683 370	3 857 649	19.5	4.7
Total	8 296 100	7 771 294	12 063 051	12 608 843	12 678 962	4.5	0.6

Source: Compiled by PIOJ from data supplied by BOJ

- Food, Drink & Tobacco (up \$611.9 million to \$5 992.0 million)
- Other (up \$174.3 million to \$3 857.6 million)
- Furniture, Fixture & Wood Products (up \$112.6 million to \$642.2 million)
- Paper, Printing & Publishing (up \$79.3 million to \$346.4 million).

Institutions Licensed Under the Financial Institutions Act (FIA)

The stock of Loans & Advances outstanding at Institutions Licensed under the FIA to the Manufacture industry was \$381.6 million at the end of 2014 compared with \$360.2 million at the end of 2013. The stock at the end of 2014 accounted for 4.2 per cent of total loans disbursed by the FIA - Licensees relative to a share of 5.2 per cent for 2013. There was an increase of \$55.7 million in the stock of Loans & Advances at the end of 2013 relative to the end of 2012.

OUTLOOK

Current policies and programmes by the MIIC will continue in 2015. Special attention will be focused on:

- SEZs, with special reference to its facilitation of the Manufacture industry
- new measures to accelerate access to finance
- continued capacity building efforts
- increasing awareness of locally-made products to facilitate greater linkages within the economy
- export promotion.

Against this background, real value added for the Manufacture industry is expected to increase in 2015. This out-turn is predicated on higher output from both the Other Manufacture and Food, Beverages & Tobacco subindustries. The improved output is based on:

- higher agricultural produce, which is expected to result in increased production for the Food Processing component of the industry
- lower production costs associated with the reduced price of crude oil on the international market
- higher production of alcoholic beverage from a major company due to import substitution as well as increased demand for flavoured beers
- enhanced linkages associated with construction and refurbishing activities within the Tourism sector.

Additionally, the industry is anticipated to be impacted positively by the Development Bank of Jamaica's partnerships with selected agencies. Notably, the collaboration with the Planning Institute of Jamaica on the Financial & Real-Time Matchmaking Expo is expected to be completed in December 2015. The aim of the project is to facilitate employment, entrepreneurship and increased access to finance. The project commenced in November 2014 with the DBJ investing \$2.5 million. The DBJ also partnered with the JMA on improving access to finance for MSMEs. The project began in March 2014 and is anticipated to end during January 2016 with the DBJ estimated to invest \$2.2 million. The Export Max 2 programme with JAMPRO is geared towards building the internal capacities of 20 current and prospective exporters to be competitively positioned to capitalise on market opportunities overseas. Expressions of interest are expected to be extended to 10 additional firms in January 2015. ■

MICRO AND SMALL ENTERPRISES

INTRODUCTION

Micro and Small Enterprises¹ (MSEs) continued to benefit from several initiatives aimed at developing their technical capacity; improving access to financing through increased availability of funds; equipping entities to better qualify for loans; and providing an enabling business environment to enhance the competitiveness of businesses and foster economic growth. Most agencies engaged their clients in capacity-building workshops and provided the opportunity for training in key business development areas. There was an improvement in the business environment evidenced by Jamaica's ranking in 2015 Doing Business Report² improving to 58 out of 189 countries from 85 in the 2014 report. With regards to financing to MSEs, there were increases in the disbursement of loans to the MSEs, as well as higher employment of own account workers.

Based on preliminary data the number of registered micro firms amounted to 6 714 compared with 6 649 in 2013, however, the number of small firms registered a decline of 17.4 per cent to 3 157 firms. The total sales from MSEs fell by 17.8 per cent to \$43.1 billion, due to reductions in sales for both micro and small enterprises. For 2014, there was growth in the volume and value of loans disbursed by most entities surveyed. Among the wholesale lenders, the Development Bank of Jamaica disbursed \$1 299.3 million, an increase of 14.3 per cent relative to 2013. This represented the largest absolute increase among wholesale lenders surveyed.

Similar to 2013, 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. On average, the number of employed Own Account Workers amounted to 408 300 persons relative to 401 550 in 2013. Increases were recorded for the average employed number of males and females in the Own Account Worker category; the number of males grew by 6 450 to 269 975, while females increased by 300 to 138 325.

Policies & Programmes

The Ministry of Industry, Investment of Commerce (MIIC) focused on key strategies that would improve the business environment, access to finance and new markets, as well as provide business development support. These were done in alignment with the goals of *Vision 2030 Jamaica—National Development Plan* and the implementation of the country's Growth Agenda.

Mobile Business Clinic Initiative

This programme, launched in 2014 and led by the Jamaica Business Development Corporation (JBDC) is slated to last for three years. It is aimed at providing business development and technical services islandwide to decentralize the support offered to MSMEs by both public and private sector partners. The first business clinic was held in Montego Bay in November 2014 and 335 entrepreneurs participated in the three-day seminar.

National Competitiveness Council (NCC)

The NCC continued to execute its core mandate of coordinating and driving reform initiatives that address impediments to establishing and doing business in Jamaica; providing policy advice on steps towards an improved and competitive business climate; and formulating necessary measures leading to speedy processing of business and investment proposals. A key outcome of the NCC Business Environment Reform Agenda was the enhancement/improvement of Jamaica's performance in the Doing Business Report (DBR), Global Competitiveness Index (GCI) and Logistics Performance Index (LPI). Jamaica moved up 27 places to 58 out of 189 countries in the DBR, 8 places in the GCI; and 54 places in the LPI.

A total of eight initiatives in the Business Environment Reform Agenda for 2014-2016 were achieved during 2014. These were under four broad reform areas, namely:

- **Starting a business** – the implementation of a single registration for business (January 2014) and an

1. Micro-enterprises in Jamaica are defined as enterprises that carry an annual turnover of less than or equal to \$10.0 million and less than or equal to 5 employees. Small Enterprises carry an annual turnover of more than \$10.0 million but less than or equal to \$50.0 million with employment greater than 5 but less than or equal to 20 employees.
2. This Report looks at regulations that enhance and/or constrain business activities in the countries surveyed. The data in Doing Business 2015 are current as at June 1, 2014.

electronic interface between the Companies Office of Jamaica and the Tax Administration Jamaica (March 2014)

- *Paying Taxes* – introduction of a Quarterly Statutory Payment (Self-Employed/Individual) form (S03) in February 2014 and a Self-Employed Persons Annual Return of Income, Taxes and Contribution form (S04) in December 2014. The S04 form is consolidated to allow individuals to use one form to report their annual income tax, education tax, and statutory contributions. The establishment of filing centres in selected collectorates continued as an on-going process
- *Enforcing Contracts & Protecting Investors* – strengthening of the commercial court division³ which was completed in January 2014 and the expansion of physical space for the court system in September 2014
- *Access to Credit* – promotion of the secured transactions framework and establishment of the venture capital programme in June 2014 and September 2014, respectively. The establishment of the venture capital framework is headed by the Development Bank of Jamaica, the activities during the year included: review of legal, regulatory and tax framework which resulted in recommendations for the suitable legislative regime; development of standardized agreements and templates for the venture capital industry; creation of an investor panel with private sector partners; and delivery of venture capital private equity courses during June–October 2014.

Subsequent to the tabling of the Insolvency Bill in December 2013, several activities took place during the year to facilitate its enactment. By the end of 2014, the following were in progress: the development and implementation of the Insolvency Act⁴; establishment of the Office of Insolvency⁵; and the appointment of a supervisor of insolvency.

National Export Strategy (NES)

The NES aimed to improve the country's export potential and was implemented during April 2010–March 2013. A review at the end of the implementation period revealed that of the 325 initiatives outlined in the strategy, a total of 205 were implemented, 68 in progress, and the remaining 52 were not implemented. In November 2014, the Commonwealth

Secretariat provided assistance to secure the services of a consultant which began developing the initiatives for Phase II of the NES. Phase II of the NES was developed to build upon the progress made in the initial three years of implementation. The initiatives under Phase II were designed to maximize contribution of exports on economic and social development. The priority and cross cutting areas were agreed upon through stakeholder consultations held in 2014. The stakeholder feedback on the draft implementation plan will commence in February 2015 with stakeholder sensitization and implementation targeted for May 2015–December 2019.

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 (UTech), Jamaica; and the Bureau of Standards, Jamaica (BSJ). Additionally, services were provided by the private sector and multilateral agencies.

Scientific Research Council (SRC)

MSEs received continued support from the SRC mainly through science and technology workshops, and training in food processing. Clients were trained in sauce processing, retort operations⁶, as well as practical sessions in food processing to 150 tertiary students. Additionally, the SRC conducted research aimed at the development of economically viable crops—of sweet potato, ginger, scotch bonnet pepper and turmeric—which would benefit the MSE.

Jamaica Business Development Corporation (JBDC)

A total of 3 352 MSMEs utilized the services provided by the JBDC compared with 3 902 MSMEs in 2013. There was a reduction in the number of interventions⁷ administered, which fell from 10 693 to 5 765 in 2014 (Table 13.1). The downturn in interventions emanated from decreases of 51.7 per cent and 74.6 per cent in assistance within Business Advisory Services and Marketing Services categories, respectively.

In order to improve their services and to assist with development of programmes for the MSME sector, the JBDC completed two main studies in 2014. These studies were 1) MSME Needs Assessment survey—approximately 1 500 MSMEs firms participated in this study with the outcome used to guide the programme design of the Mobile Business

3. The commercial court division is under the jurisdiction of the Supreme Court and deals mainly with commercial disputes.
4. The Act will result in reduced costs associated with business failures as well as modernized the rules and procedures for handling corporate and personal insolvencies thereby encouraging more businesses to restart after a failure.
5. The functions of the Office of Insolvency will include: accepting applications for and issuing licences for approved trustees for a company; investigate businesses, companies or assets that fall under the Insolvency Act; maintain a record of complaints from creditors of a business facing financial difficulties; and investigate the conduct of persons applying for bankruptcy.
6. Retort operations refer to the commercial sterilization by the application of heat.
7. An intervention is the delivery of products and services by JBDC to each client and entity.

TABLE 13.1
JBDC ACTIVITIES

Products & Services	Description of Interventions	Number of Interventions	
		2013	2014
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	8 804	4 248
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	933	1 162
Marketing Assistance	Retailing – Things Jamaican Stores; Marketing Consultation – Screening of Products; Market Research; Market Access – Participation in trade shows and expositions	956	243
Research & project Management	Business Development Loans; Financial Brokerage Services – loan and grant funds on behalf of other agencies; Financial advice and monitoring	0	112
TOTAL		10 693	5 765

Source: Jamaica Business Development Corporation

Clinic, and 2) MSE Profile 2013—study done to expand the JBDC’s data on the MSME activities. The results from the latter included, among other things, information on the socio-demographic profile of businesses; markets and distribution channels used and available to MSEs; use of information and communication technologies, research & development, pricing strategies and financial management methods in businesses; and training and resource needs of MSEs.

Training

Participants at the 7th annual Small Business Expo—held in May 2014 under the theme ‘Positioning MSME for the Global Value Chain’—were exposed to business development support, consultation and guidance. A total of 652 participants benefited from 41 exhibits from selected companies, 10 workshops, and 5 panel discussions.

The Proposal Writing Intervention programme was continued in 2014 with two workshops held in March and November. The programme aimed to equip MSMEs with the capacity to develop “high-potential” proposals, thereby increasing funding to MSMEs through new avenues. Participants benefited from coaching and mentoring in the development of project proposals as well as a copy of the donor registry. Eight proposals were developed, of which six received funding valued at \$17.0 million, relative to three of five proposals developed and received funding valued at \$14.5 million in 2013.

PATH Steps to Work

The Steps to Work programme is designed as a welfare exit programme for PATH families. The JBDC continued its

partnership with the Ministry of Labour and Social Security through the provision of business development training and support to selected PATH beneficiaries. Under the programme, these beneficiaries were screened for entrepreneurial experience and 600 individuals received training in Basic Business Development, Operating a Business in Jamaica, and How to Grow your Business.

North Coast Craft Revitalization Project

This project, which began in May 2013, is aimed at improving the competitiveness and income generation capabilities of craft producers in the north coast region. The following activities were achieved in 2014: delivery of eight product and business development training through which 75 producers benefited; assistance provided to 80 producers on the development of product branding and promotional materials; development and upgrading of 90 products/ prototypes; and provision of market access to 30 producers at events such as JAPEX 2014 and Kumba Mi Yabba.

Technology Innovation Centre (TIC) – University of Technology, Jamaica

During the review period, the TIC supported several programmes that were beneficial to MSEs. The number of clients who participated in incubation programmes declined in 2014, partly due to the graduating of tenants who moved to their own premises. At the end of 2014 there were 31 clients compared with 34 at the end of 2013, the disaggregation was as follows:

- *Associate Platinum Programme* – which accommodates shared offices for clients from varying background, remained constant with 16 clients
- *Virtual Programme* – clients who wish to have a business address but work from home or in the field, four participants relative to six in 2013
- *Anchor Tenancy Programme* – four clients similar to 2013, this programme facilitates stronger clients who assist with the incubator programmes
- *Residential Programme* – three clients were occupying three available office spaces, the same as in 2013
- *Student Incubator Programme* – geared at business persons who are students; two clients participated, one less than in 2013
- *Associate Premium Programme* – offers space with internet, telephone and a desk on a first come basis, this remained unchanged with two participants.

A main highlight was the UTech Business Model Competition which solicited business ideas from students.

Bureau of Standards Jamaica

The BSJ continued its assistance to MSMEs through the development of standards; improvement of testing facilities; delivery of capacity building workshops, and partnerships with member groups. A total of nine food tests conducted by the BSJ were accredited by the Jamaica National Agency for Accreditation, while another 16 tests related to microbiology and packaging were accessed and are awaiting accreditation. The accreditation of these tests is necessary for Jamaican food products to gain access to export markets. Persons received training from the BSJ in areas such as quality management standard, good manufacturing practices, food safety, the new standard for bag drink, and revised standard for the manufacture of bread. Additionally, 30 persons were trained in the Better Process Control School. This is a requirement course under the US Food Safety Modernization Act for processing operations supervisors in factories that produce acid and acidified foods.

As part of the continued implementation of *Bamboo Products Industry Project*, the main deliverables were:

- passage of a private members motion on the development of the bamboo industry in the Senate in January 2014
- development of four bamboo standards
- development of prototypes—these included charcoal water filter, vase, slippers, utensils, and bamboo ketchup

- establishment of a bamboo theme park and nature trail in Hanover
- one farm received USDA certification to produce organic bamboo which will be used in the manufacture of organic bamboo charcoal
- staging of a National Bamboo Forum.

United States Agency for International Development (USAID)/Jamaica

The USAID continued to support the MSEs by providing access to credit through a partnership with a local financial institution; technical assistance by way of Development Grants Program (DGP); and promotion of entrepreneurship under the Junior Achievement (JA) Jamaica Program. In 2014, four DGPs ended. Under these programmes micro enterprises benefited from capacity building in areas such as fish farming, hydroponics, ornamental fish production for export, bee-keeping, protected agriculture/greenhouse farming, and agro-processing activities.

USAID also continued its support of the JA Jamaica programme, which is geared at building entrepreneurial skills at the youth level. A major initiative, JA Biztown, was launched in 2014 which targeted students of Grades five and six. These students were exposed to age-appropriate business, financial and workforce readiness concepts, followed by a day-trip to a business simulation centre where they acted as employees and employers while conducting business transactions at replicas of Jamaican companies.

PERFORMANCE

Based on preliminary GCT returns, the number of MSEs engaged in business activities in 2014 amounted to 9 871, of which 6 714 were micro firms. There were 10 472 registered MSEs with 6 649 classified as micro firms in 2013. Combined, micro and small enterprises accounted for 81.7 per cent of GCT registered companies relative to 79.9 per cent in 2013. Among the total MSEs that filed GCT returns, 4 396 were aligned to the Wholesale & Retail Trade industry, followed by Real Estate, Renting & Business Services with 2 443 (Table 13.2).

Although MSEs comprised the majority of registered firms, overall sales by MSEs represented 4.9 per cent of income generated by all the companies that filed returns. Preliminary GCT data revealed that sales (in real terms) by MSEs totalled \$43.1 billion relative to \$52.4 billion in 2013 (Table 13.3). Small firms accounted for 78.4 per cent of total sales by registered MSEs compared with 80.8 per cent in the previous year. The lower out-turn reflected declines in sales in all industry groupings.

TABLE 13.2
NUMBER OF MSEs ACCORDING TO GCT RETURNS, 2012–2014

INDUSTRIES	2012 ^r		2013 ^r		2014 ^p	
	Micro	Small	Micro	Small	Micro	Small
Agriculture, Fishing, Hunting & Forestry	90	44	65	43	65	26
Mining & Quarrying	25	9	39	9	38	9
Manufacturing	482	293	467	285	492	237
Electricity, Gas & Water	12	1	11	2	10	2
Construction	325	103	316	97	323	78
Wholesale & Retail Trade; Repair Of Motor Vehicles						
Motorcycles & Personal Household Goods	2 774	1 870	2 720	1 902	2 694	1 702
Hotel & Restaurants	353	169	328	176	332	143
Transport, Storage & Communication	370	158	344	175	363	138
Financial Intermediation	149	84	150	85	158	86
Real Estate, Renting & Business Activities	1 792	646	1 824	706	1 857	586
Public Administration & Defence, Compulsory Social Security	41	10	38	10	46	8
Education	13	7	12	6	14	3
Health & Social Work	33	31	38	30	37	32
Other Community Social & Personal Service Activities	305	140	297	297	285	107
TOTAL	6 764	3 565	6 649	3 823	6 714	3 157

r - revised

p - preliminary

Source: Compiled by the PIOJ from data received from eGov Jamaica Limited

TABLE 13.3
MSEs Sales ACCORDING TO GCT RETURNS, 2012–2014
(\$ MILLION)

INDUSTRIES	2012 ^r		2013 ^r		2014 ^p	
	Micro	Small	Micro	Small	Micro	Small
Agriculture, Hunting & Forestry	147.3	567.8	113.4	493.9	98.2	282.2
Mining & Quarrying	25.7	118.4	34.4	126.7	31.3	96.9
Manufacturing	825.7	3 817.2	694.8	3 395.8	681.6	2 619.1
Electricity, Gas & Water	11.9	7.7	11.7	16.8	8.7	19.7
Construction	404.9	1 227.6	341.3	1 004.8	328.7	867.2
Wholesale & Retail Trade; Repair Of Motor Vehicles						
Motorcycles & Personal Household Goods	4 901.5	23 864.4	4 402.2	22 265.9	3 999.8	18 431.0
Hotel & Restaurants	662.9	2 201.0	583.3	2 047.2	534.4	1 429.6
Transport, Storage & Communication	573.3	1 993.4	485.2	1 951.7	481.6	1 424.2
Financial Intermediation	204.0	1 104.9	182.4	1 061.2	174.1	956.5
Real Estate, Renting & Business Activities	2 865.6	7 694.3	2 628.1	7 734.4	2 443.8	6 020.5
Public Administration & Defence, Compulsory Social Security	54.7	142.3	51.1	140.6	42.0	88.1
Education	242.0	97.4	24.3	55.5	20.5	28.4
Health & Social Work	48.8	429.1	47.7	431.8	47.7	389.1
Other Community Social & Personal Service Activities	471.4	1 649.0	462.3	1 564.7	396.0	1 117.4
TOTAL	11 222.1	44 914.5	10 062.2	42 291.1	9 288.3	33 769.8

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 Limited⁸, the Micro Investment Development Agency, and the Development Bank of Jamaica. All of the survey lenders recorded increases in total disbursement to MSMEs (Table 13.4). With respect to retail lending agencies, most of those surveyed had higher disbursements in the value of loans (Table 13.5).

Wholesale Financing

Sagicor Bank Jamaica Limited (SBJL)

At the end of December 2014, the GOJ/EU Micro and Small Business Lending Scheme monitored by the SBJL had a loan portfolio balance of \$88.7 million. Loans were made available to 15 approved Participating Credit Institutions (PCI), of which five were active, nine inactive and one suspended during 2014. A total of \$72.0 million was disbursed to PCIs, compared with \$49.7 million in 2013. The PCIs disbursed 1 390 loans valued at \$35.8 million, relative to 1 307 loans valued at \$61.9 million in 2013.

Development Bank Jamaica Limited (DBJ)

The number of loans approved for MSEs during 2014 amounted to 10 235 with a value of \$1 275.1 million, relative to 5 556 loans valued at \$1 379.0 million in 2013. The lower value in approved loans was due to declines in two of the four disbursement channels, with National Peoples Co-operative Bank (NPCB) accounting for the largest decrease. In contrast, the value of loans disbursed amounted to \$1 299.3 million, representing an increase of \$162.4 million compared with 2013 (see Table 13.4). Of the funds disbursed in 2014, the allocation by channel was:

- Approved Financial Institutions (AFI) – \$399.8 million, up \$368.5 million

- Micro Finance Institutions – \$756.6 million, up \$338.5 million
- National Peoples Co-operative Bank (NPCB) – \$135.5 million, down \$499.5 million
- Direct – \$7.4 million, down \$45.1 million.

Analysis done by industry grouping revealed that the rise in disbursement was attributed to Services & Transportation (up \$475.5 million to \$552.4 million); Distribution (up \$275.3 million to \$380.5 million) and Tourism (up \$25.7 million to \$42.6 million). The Agriculture & Agro-Processing category registered the highest absolute decline of \$465.4 million to \$254.1 million in 2014.

Throughout the year, the DBJ partnered with several entities to develop projects geared at building the capacity within MSMEs and increase their access to financing. Most of these projects commenced in 2014 and will continue over the next two to three years. In collaboration with accredited financial institutions and business development organizations, the DBJ launched its Voucher for Technical Assistance programme in May 2014. This programme targeted SMEs by providing capacity development services to improve their chances of accessing credit. Other key projects included:

- SME capacity building model for venture capital-readiness—this project began in January 2014 and is aimed at strengthening the organizational framework of 30 high-growth potential SMEs thereby positioning them to access venture capital opportunities
- Financial Information and Matchmaking Expo (FIRM)—this expo allowed entrepreneurs with potentially viable business ideas to receive capacity development and access to financing by pitching their idea to a panel of financiers. At the Kingston & St. Andrew Expo, held in October 2014, some 24

TABLE 13.4
DISBURSEMENTS BY WHOLESALE AGENCIES, 2010–2014
(\$Million)

AGENCIES	2010	2011	2012	2013 ^r	2014	% Change
						2014 2013
Sagicor Bank Jamaica Limited	64.5	76.9	96.9	49.7	72	44.9
Micro Investment Development Agency	95.8	146.1	136.8	171.2	156.3	-8.7
National Insurance Fund	921.9	n/a	930.2	935.2	n/a	
Development Bank of Jamaica	661.7	n/a	1 593.2	1 136.9	1 299.3	14.3

n/a - not available

Source: Compiled by the PIOJ using data received from MIIC and Respective Funding Programmes

8. The SBJL is one of the Government of Jamaica appointed wholesale agents to provide loans to Participating Credit Institutions for on-lending.

participants were shortlisted to make pitches, with 14 projects receiving matches amounting to \$1.9 billion. The FIRM expo is to continue islandwide in 2015

- MSME finance directory—a web based database for aggregation of financing source was developed and populated with approximately 70 financing sources. Under this project the website will be continually updated over the next five years.

Micro Investment Development Agency (MIDA)

MIDA disbursed a total of \$156.3 million to approved Micro Finance Organizations (MFO) for on lending to MSMEs, compared with \$171.2 million disbursed in 2013. The sources of funding for disbursements were:

- the Agency’s internal portfolio which accounted for \$6.3 million
- GOJ/Government of Netherlands (GON) Credit Scheme which contributed \$150.0 million.

Of the Funds made available to MFOs, \$142.8 million were taken up by MSMEs during the year, a \$14.1 million decrease relative to 2013. Females accounted for \$71.9 million, a

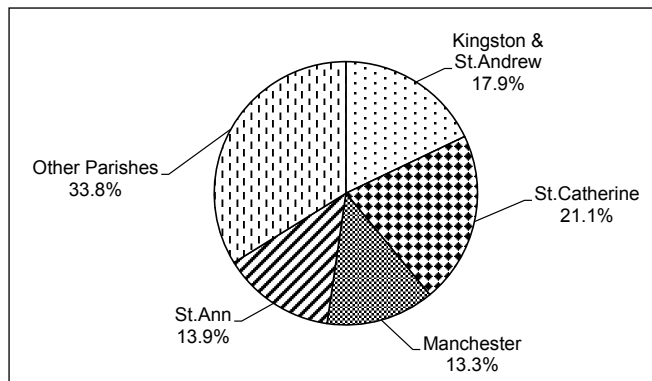


FIGURE 13A: MIDA LOANS DISBURSED BY PARISH, 2014

decrease of 37.2 per cent compared with 2013. However, there was an increase of 38.3 per cent in value of loans disbursed to males. The total number of enterprises funded by the Agency was 1 074 compared with 3 170 enterprises in 2013. This reflected decreases in loans to enterprises operated by both females (down, 1 684 to 627) and males (down, 412 to 447). Loans to SMEs in St. Catherine, Kingston & St. Andrew, St. Ann and Manchester, together accounted for 67.5 per cent of total loans disbursed (Figure 13A).

Loans disbursed were used to invest in activities in three sector groupings—Services, Manufacture, and Agriculture. The majority of the disbursements were to enterprises operating in the Services category, which received \$110.4 million representing a decline of 23.0 per cent compared with 2013. The other loan categories, however, recorded increases of \$6.4 million to \$13.0 million, and \$3.1 million to \$19.5 million for Manufacture and Agriculture, respectively.

SELECTED RETAIL LENDING AGENCIES

Jamaica National Small Business Loan (JNSBL) Limited

The total value of loans disbursed in 2014 grew by 11.6 per cent to \$2 900.7 million despite a decline of 475 to 25 087 in the number of loans issued (Table 13.6). The increase in the value of loans emanated from higher uptake for six of the seven loan portfolios. The rise in disbursements was supported by the introduction of new portfolios, salary express and small business loans.

Six of the 10 economic industries received higher disbursements relative to 2013, while the economic activities which accounted for the larger shares of disbursements remained the same. The Distribution category accounted for 60.0 per cent of total value of disbursements followed by Services (14.7 per cent), Agriculture (8.5 per cent) and Manufacturing (5.4 per cent) {Figure 13B}.

At the end of December 2014, the JNSBL loan portfolio was valued at \$1 283.1 million with 14 288 customers

TABLE 13.5
DISBURSEMENTS BY SELECT RETAIL LENDING AGENCIES, 2012–2014
(\$Million)

AGENCIES	2012	2013	2014	% Change 2014 2013
Jamaica National Small Business Loan	2 361.6	2 600.0	2 900.6	11.6
EX-IM Bank	946.6	3 953.4	n/a	
Access Financial Services	422.0	621.8	681.7	9.6
NCB SME	17.5	25.5	25.1	-1.6
Credit Union	353.2	299.6	1 100.3	3.8

n/a-not available

Source: Compiled by the PIOJ using data received from MIIC and Respective Funding Programmes

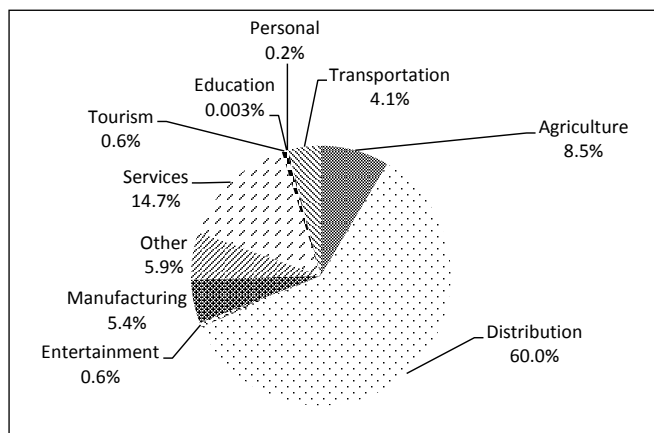


FIGURE 13B: JNSBL DISBURSEMENTS BY TYPE OF ECONOMIC ACTIVITY

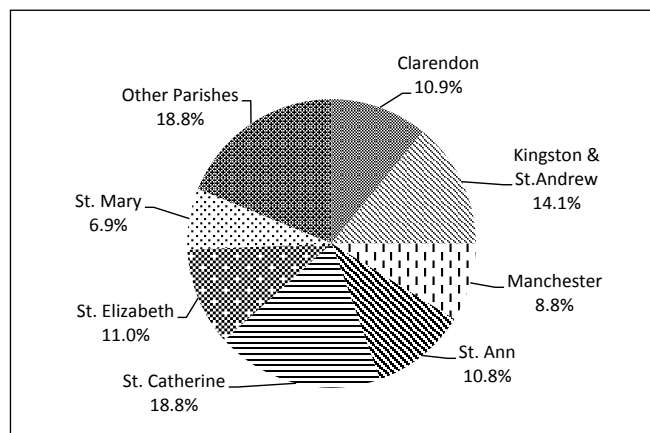


FIGURE 13C: JNSBL LOAN PORTFOLIO BY PARISH

compared with \$988.2 million and 14 552 customers for 2013. The analysis by parish indicated that 63.4 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). A total of 12 390 of the customers in the loan portfolio were classified as micro enterprises compared with 14 511 in 2013. Similar to 2013, females accounted for majority of micro enterprise clients of

the JNSBL; they accounted for 8 874 relative to 10 501 in 2013.

BizGrow⁹ – The number of loans disbursed under the BizGrow facility fell by 1 308 to 22 889. However, there was an increase of 2.3 per cent in the value of loans totalling \$2 454.5 million (see Table 13.6). This disbursement facilitated employment of 16 181 persons relative to employment for 17 002 persons in 2013. At the end of December 2014, the

TABLE 13.6
JNSBL LOAN DISBURSEMENT, 2011–2014

	2011	NUMBER OF LOANS DISBURSED		
		2012	2013	2014
BizGrow	27 921	23 595	24 197	22 889
BizBoost	7	5	12	22
Agriculture	n/a	2	5	16
Education	n/a	136	482	311
Motor Vehicle	n/a	25	23	64
Personal	n/a	545	834	1 776
Other ^a	n/a	125	9	9
Total	27 0928	24 433	25 562	25 087
		VALUE OF LOANS DISBURSED (\$MILLION)		
BizGrow	2 092.4	2 227.3	2 339.8	2 454.5
BizBoost	4.7	9.15	33.6	54.5
Agriculture	n/a	1	1.3	11.5
Education	n/a	16	47.3	31.9
Motor Vehicle	n/a	26	26	76.6
Personal	n/a	68	90.7	267.2
Other ^a	n/a	15	1.3	4.5
Total	2 097.1	2 361.6	2 600.0	2 900.7

a - Other category includes hurricane, salary and small business loans
n/a - not applicable

Source: JNSBL

9. BizGrow loans are extended for the expansion of micro businesses.

BizGrow portfolio stood at 12 390 loans valued at \$874.3 million, compared with 13 144 loans valued at \$825.7 million in 2013.

BizBoost¹⁰ – Disbursements under the BizBoost facility continued to be financed by funds from the National Insurance Fund (NIF) and EX-IM Bank. Disbursements under this facility totalled 22 loans relative to 12 in 2013, with respective values of \$54.5 million and \$33.6 million. The BizBoost portfolio at the end of December 2014 was 37 loans valued at \$74.0 million relative to 28 loans valued at \$37.1 million in 2013. Of the total loan portfolio, 22 loans were financed by funds from the EX-IM Bank while the remaining 15 loans were funded by resources derived from the NIF and DBJ. There was employment of 124 persons associated with the disbursement under the BizBoost facility, relative to 155 in 2013.

Access Financial Services

There was an increase of 9.6 per cent to \$681.7 million in the value of loans disbursed to the micro and small businesses. However, there was a decrease in the number of loans issued which amounted 13 142 relative to 13 796 in 2013. Declines were recorded for all loan categories, except for Agriculture which increased by 10.7 per cent to 1 778 loans. The categories registering reductions were as follows:

- Trading/Distribution – 7 952 (down 275)
- Services – 3 021 (down 531)
- Manufacturing – 391 (down 20).

The reduction in the volume of loans reflected a decline in loans issued to new applicants (down 38.9 per cent to 3 750 loans) as issuance to repeat applicants increased (up 18.1 per cent to 9 392 loans).

First Union Financial Company Ltd

The total number of loans disbursed for 2014 amounted to 696 relative to 687 in 2013. The number of loans disbursed to small businesses grew by 20 to 34, whereas loans to micro businesses fell from 673 to 662. There were increased disbursements to three of five loans categories— Trading up by 50 to 330; Agriculture up by 6 to 25 loans; and Accommodation & Entertainment up by 3 to 5 loans.

National Commercial Bank Small & Medium Enterprises (NCBSMEs)

Micro and small enterprises benefited from capacity building and new services initiatives offered by NCBSME, these included:

- Special loan facilities – SMEs benefited from two special loan promotions during 2014, that provided access to unsecured financing for working capital and to purchase inventory
- NCB Capital Quest – is a reality television programme in which SMEs competed for capital investment. Throughout the episodes, the selected SMEs benefited from capacity building and competitive activities designed to showcase the entrepreneurs and their businesses to investors
- Training – in partnership with the HEART Trust/NTA, 13 SMEs were trained in the area of business management and taxation. An additional 19 SMEs benefited from training in capacity building over an eight-month period.

The NCB SME disbursed a total of 787 loans relative to 1 249 in 2013. The stock of loans at the end of December 2014 was \$25.1 billion, compared with \$25.5 billion at the end of the corresponding period of 2013. Of the total stock of loans, business customers with loan amounts under \$50.0 million accounted for \$13.6 billion.

Credit Union

Loan data from 16 of the 37 credit unions revealed that loans disbursed by credit unions were valued at \$1 100.3 million during 2014. In 2013, disbursement by 18 of the 38 credit unions to MSEs amounted to \$299.6 million.

OTHER DEVELOPMENTS

The FINPYME ExportPlus programme which started in 2012, came to a close in July 2014 with a showcase event. Over the implementation period, a total of 11 workshops covering 30 modules were delivered to assist selected SMEs with assessing export markets. Approximately 300 SMEs received technical support under this programme. The key areas of focus were capacity building, acquiring certification process management, and access to international markets.

Under the World Bank & Government of Jamaica's growth & competitiveness project, the SME Capacity Building component was developed. The objective of the programme was to increase employment by upgrading existing SMEs in specific value chains. The programme is slated to end in 2019 at a cost of \$825 million.

A public-private partnership was established in 2014 to implement a socio-economic project labelled "Gas Pro Street Style Cook-Up" competition for operators of cook shops. During 2014, selected MSEs that operate within two

10. The funds under this facility are made available for the production of craft items, light manufacturing, agriculture, agro processing, tourism, mining, quarrying and services.

Community Renewal Programme¹¹ (CRP) communities benefited from capacity building workshops that were held for participants in the cooking competition. There were a total of 38 contestants in the competition held in Waterhouse community, while the competition for Parade Gardens community had 18 contestants. Additionally, residents of these communities received short-term employment in the areas of security, brand ambassadors for the main sponsor, customer service representatives and clean-up officers to facilitate the execution the event.

OUTLOOK

As the GoJ continues to implement the business environment reform agenda for 2014–2016, it is expected the passage of key legislation will spur improved performance from MSEs. Entrepreneurs will continue to benefit from technical assistance throughout 2015 to further improve their contribution to growth in the economy. Specifically, improved business development and institutional support for MSMEs will come from the continued implementation of the Mobile Business Clinic and the roll-out of the Small Business Development Center (SBDC) Model. The SBDC model originated in the United States as the main source of technical and managerial assistance to small businesses, and has been adapted in other regions. The core services offered under the SBDC will be technical assistance, group training and market research. Additionally, through the SBDC network,

enterprises will be able to globally showcase their products on an electronic platform.

Several other projects are on target to begin implementation in 2015, these include:

- ***Business Entrepreneurial Empowerment Programme (BEEP)*** – provide MSMEs with assistance to improve their business risk rating, thereby facilitating access to financing
- ***Caribbean Development Capacity Building in Jamaican MSMEs in Agro Processing to Satisfy International Food Safety Requirements*** – 14 food processing facilities will be upgraded with food safety systems
- ***Start Up Grants for Innovation Projects*** – this will provide entrepreneurs with a grant of up to \$4.0 million or 75.0 per cent of the project cost for implementing innovation activities.

The JBDC will embark on a project to assist MSMEs operating in the Manufacture and Agriculture industries to form part of the supply value chain of the Marriot hotel which will be opened in 2015. The project will train 105 MSMEs in the areas of market readiness and market access, with particular focus on the development of products that meet the quality requirements of the hotel. ■

11. The Community Renewal Programme coordinates the implementation of holistic interventions in 100 of the most vulnerable and volatile communities in Kingston, St. Andrew, St. Catherine, Clarendon and St. James. Through these interventions citizens should be enabled to live full and satisfied lives in safe and just communities.



CONSTRUCTION

INTRODUCTION

The Construction¹ industry recorded a 1.4 per cent increase in real value added relative to 2013 (Figure 14A). This performance was due to increased activities associated with the Other Construction and the Building Construction categories of the industry. An increase in the Civil Engineering subcategory influenced the performance in Other Construction as work intensified on the Caymanas to Linstead (St. Catherine) and the Moneague to Ocho Rios (St. Ann) segments of the North-South leg of Highway 2000. Non-Residential projects, which included the renovation and construction of hotels; and the infrastructural expansion of the Business Process Outsourcing (BPO) industry, drove the increase in Building Construction.

The higher growth for the industry was reflected in the improved performance of some inputs used in the production process such as cement. The supply² of cement to the domestic market recorded its second consecutive annual increase to 721 987 tonnes from 702 515 tonnes in 2013. This outcome was due to the combined effect of a 0.6 per cent increase in cement production to 830 061 tonnes and a 22.5 per cent increase in cement imports to 124 692 tonnes. However, there was a 6.1 per cent increase in cement exports to 232 766 tonnes.

The average number of persons employed in the industry declined by 2.5 per cent to 80 925 individuals (Table 14.2). This was due to declines in the average number of males and females employed, down 2.0 per cent to 78 550 persons and 17.4 per cent to 2 375 persons, respectively.

POLICY AND PROGRAMMES

The policy objectives for the Construction industry continued to be aligned with the *Medium Term Socio-Economic Policy Framework (MTF) 2012-2015*. The *MTF 2012-2015* which is an integrated development framework for inclusive growth and sustainable development industry under Vision 2030 Jamaica – National Development Plan, outlines the strategic objectives during the medium-term. Government policies related to the industry were aimed at providing an overall policy framework to guide the development of the Construction industry; and the development of housing solutions. To facilitate the achievement of these goals, the following policies and plans were reviewed in 2014:

The National Housing Policy and Implementation Plan 2011 (Draft)

Consultations continued towards finalizing the update and review of the National Housing Policy and Implementation Plan. The Policy and Plan are intended to:

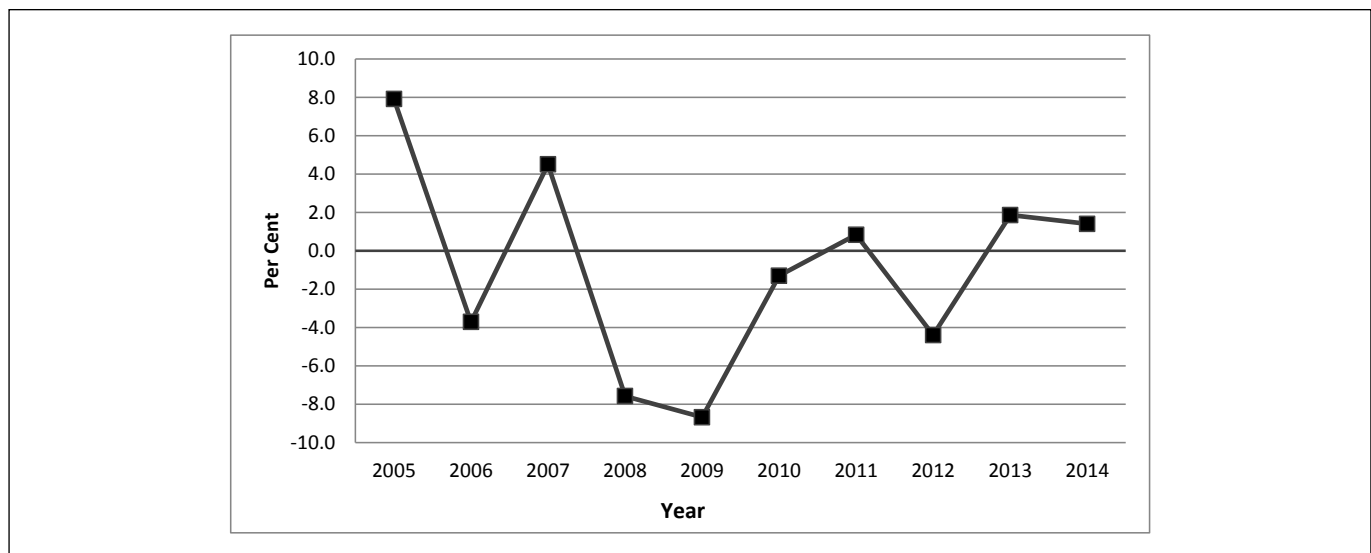


FIGURE 14A: REAL VALUE ADDED GROWTH RATES FOR THE CONSTRUCTION INDUSTRY

1. Building Construction, Other Building Construction, and Building Installation are the categories under the Construction industry.
2. Total Supply = Total Production – Exports + Imports.

14.2

- give strategic direction to the housing sector
- enable the Government of Jamaica (GoJ) to meet its vision of providing access to affordable, safe and legal housing solutions to Jamaicans
- provide an enabling framework within which the GoJ can realize its vision for the Construction industry by 2030.

Review sessions were conducted by the Technical Review Committee which was established to guide the development of the Policy and Plan. Updates were made to the document to include the findings of the Population and Housing Census 2011. A draft Cabinet submission was prepared requesting permission to undertake public consultations on the draft Policy and Plan. Final submission and approval is expected in 2015.

Construction Industry Policy

The review of the Construction Industry Policy Green Paper was completed in 2014 following consultations with relevant stakeholders. During the year, a submission was also made seeking the approval of Cabinet for the policy to be tabled as a White Paper. The aim of the Policy is to address the need for a comprehensive framework that links all the various elements, and to express clearly the GoJ's objectives for the industry. When promulgated, the Construction Industry Policy will facilitate the development of the industry by addressing the following issues related to:

- safety and security including extortion
- quality of inputs and outputs
- environmental factors
- the registration of professionals and enterprises
- the improvement of procurement rules and guidelines
- the development of skill levels within the industry, with special focus on training and certification.

Amendment of the Mortgage Insurance Act (1960)

Mortgage Indemnity Insurance (MII) was established through the Mortgage Insurance Act of 1960 and is facilitated by the Jamaica Mortgage Bank (JMB) on behalf of the government. Mortgage Indemnity Insurance is the means by which the government provides insurance for the upper limit of a mortgage; hence, an increase in the upper limit will allow financial institutions to facilitate lower deposits. The Act was amended to permit an increase to 97.0 per cent from 90.0 per cent of the appraised value of the property on which MII can be granted. This is expected to increase the accessibility of mortgages by relieving prospective homeowners of the burden of a high down payment. This will result in a fall in the down payment required to as low as three per cent of the property value relative to a high of up to 15 per cent prior to the amendment.

The following programmes and surveys were also conducted in 2014 as part of a strategy for increasing access to sustainable housing development in Jamaica:

Participatory Slum Upgrading Programme (PSUP)

The PSUP is a regional programme which was initiated by United Nations–Habitat (UN) in collaboration with the African Caribbean and Pacific (ACP) States. The programme, which is financed by the European Commission, is designed to:

- improve urban development strategies
- upgrade and prevent the formation of slums at the local, national and regional levels.

In 2008, Jamaica participated in Phase I of the programme which was initially implemented in three urban centres namely: Montego Bay, Old Harbour/Old Harbour Bay, and May Pen.

Phase II of the PSUP commenced in August 2014 and site visits were undertaken for the three urban centres by the UN as part of an evaluation for the commencement of the second phase of the project. Phase II of the project was facilitated by the signing of a Memorandum of Understanding; and an Agreement of Co-operation. There are six outputs, three of which were undertaken by a consultant in October 2014 and draft reports submitted to the Ministry of Transport, Works and Housing (MTWH). These outputs included:

- A citywide situational analysis report
- A policy and regulatory review report
- Reports on the adaptation of the International Guidelines on Decentralization; and on Access to Basic Services.

In addition, request for proposals were evaluated for two of the remaining three outputs, namely: a citywide slum upgrading strategy report; and a resource mobilization report. However, the award of the contract remained outstanding at the end of 2014.

Socio-economic Surveys

The MTWH undertook socio-economic surveys of residents from seven settlements. The aim of this initiative was to inform plans to address the issues of inadequate physical and social infrastructure in these squatter settlements. A total of 1 585 persons, constituting 569 households and 62 commercial enterprises located in the same settlements, were surveyed. These communities were located in sections of Kingston, Westmoreland and St. Ann. The result of the surveys indicated that most persons in these areas lacked secure tenure and highlighted issues of affordability as it relate to the MTWH's plan to formalize these settlements.

INDUSTRY PERFORMANCE

The performance of the industry was driven primarily by the Other Construction category, which was influenced

by Civil Engineering projects, such as road infrastructural activities. An increase was also recorded for Building Construction reflecting an increase in the Non-Residential component due to the renovation and construction of hotels and the building of BPO infrastructure. This was tempered by a decline in Residential activities, due to a lower volume of housing starts and completions.

NON-RESIDENTIAL ACTIVITIES

Three of the eight select-institutions recorded increased capital expenditure on construction-related activities (Table 14.1).

- National Road Operation and Construction Company (NROCC) expended \$26 357.4 million to support the construction of the Caymanas to Linstead, and the Moneague to Ocho Rios segments of the North-South link of Highway 2000. This disbursement represented an increase of 29.7 per cent relative to 2013. Also included in this amount was expenditure related to the completion of the Linstead to Moneague segment which was opened in August 2014.
- The telecommunications sub-sector disbursed \$7 379.7 million compared with \$2 387.8 million in 2013. The majority of this expenditure was associated with the improvement of mobile and broadband networks.
- The Port Authority of Jamaica increased its expenditure by 60.7 per cent to \$131.9 million. The main areas of focus were infrastructural development, the rehabilitation of docks and berths, and the execution of commercial activities.

The disbursements by the five remaining entities recorded declines and were disaggregated as follows:

- The National Works Agency recorded a 63.5 per cent reduction in expenditure which totalled \$2 792.8 million. This was due primarily to lower expenditure associated with the Jamaica Development Infrastructure Programme (JDIP) which officially ended on October 31, 2013. During the year, disbursements under the JDIP totalled \$1 328.4 million compared with \$7 309.5 million in 2013 and was related to the continued winding down of the programme. Expenditure associated with Tropical Storm Nicole–KMA Drainage Project funded by the Caribbean Development Bank also declined by \$58 903.0 million to \$23 539.7 million. The Major Infrastructure Development Programme (MIDP) commenced disbursements which totalled \$1 047.1 million. MIDP expenditure consisted of the Jamaica Emergency Employment Programme (JEEP) component for which road maintenance and rehabilitation works, including sidewalk maintenance,

drainage improvement and de-bushing were undertaken.

- The National Water Commission (NWC) expended \$7 393.0 million which represented a decline of 32.2 per cent. The main projects included the Jamaica Water Supply Improvement Project (JWSIP) which recorded \$3 371.9 million and the Portmore Sewerage Project which disbursed \$1 006.5 million. Expenditure on the JWSIP fell by 26.6 per cent compared with disbursements in 2013. In addition, \$46.5 million was disbursed for the Kingston Metropolitan Area (K-Factor) project compared with \$826.0 million in 2013.
- The Jamaica Public Service (JPS) recorded a decline in capital expenditure of 10.1 per cent to \$5 477.6 million. Expenditure related to the generation and distribution of electricity totalled \$4 202.1 million and accounted for 76.7 per cent of total disbursements compared with \$5 165.02 million which represented 84.8 per cent of total expenditure in 2013.
- The Jamaica Social Investment Fund (JSIF) disbursed 64.7 per cent less on the construction of schools, community centres and homes for the elderly. Capital expenditure by JSIF totalled \$495.1 million compared with \$1 401.8 million in 2013.
- The Urban Development Corporation (UDC) recorded a decline of 8.6 per cent in capital expenditure. The main area of expenditure was the renovation of the Kingston Craft Market and the installation of electrical and networking infrastructure at the Dunn's River ticketing office was \$315.9 million.

Other Non-Residential activities included the expansion of the BPO infrastructure and the renovation and construction of hotels. Construction commenced on Hyatt Ziva and Zilara in January 2014 and the hotel was opened in December 2014. Work also continued on Courtyard by Marriot which began in 2013. This 130-room, five-storey corporate hotel is scheduled to be completed in 2015.

RESIDENTIAL CONSTRUCTION³

Housing Starts⁴: Housing Starts for 2014 declined by 29.8 per cent to 2 034 units (Table 14.2). This was primarily associated with a reduction in the number of starts by the Housing Agency of Jamaica (HAJ) from 938 units to 99 units. There was also a decline of 8.3 per cent in the number of starts by the NHT to 1 548 units. Construction activities by the NHT were disaggregated as follows:

- Construction Loans for 713 units relative to 872 units in 2013. This influenced the decline in the number of starts by the NHT.

3. Data on housing starts and completions are compiled using data provided by select-entities.

4. Housing Starts refer to the commencement of infrastructure/foundation work on a housing solution.

TABLE 14.1
CAPITAL EXPENDITURE BY INSTITUTIONS
\$*MILLION

Executing Agency	2009	2010	2011	2012	2013 ^r	2014 ^p	% Change 2013/2012	% Change 2014/2013	
National Works Agency (NWA)	241.1	5 913.7	15 378.6	15 053.1	7 652.8	2 792.8	-49.2	-63.5	Expenditure on Road Construction which included the Major Infrastructure Development Project and the Jamaica Development Infrastructure Programme.
National Road Operating & Construction Company Limited (NROCC) ^b	3 191.9	779.0	3 288.3	5 062.8	20 325.6	26 357.4	301.5	29.7	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	7 393.0	86.2	-32.2	Main projects were the: Jamaica Water Supply Improvement Project; Portmore Sewerage Project; and Rehabilitation of Potable Water KMA Project.
Jamaica Public Service Company Limited (JPSCo)	1 640.3	3 853.5	4 718.9	5 541.8	6 092.4	5 477.6	9.9	-10.1	Funds were utilized mainly in construction and installation activities in the Distribution and Generation of power.
Telecommunication Sub - Sector	4 625.4	5 234.6	6 258.7	2 482.6	2 387.8	7 379.7	-3.8	209.1	Expenditure on mobile communications expansion of the GSM network, as well as costs relating to Building Services, tools and testing equipment.
Jamaica Social Investment Fund (JSIF)	570.8	516.5	930.4	750.3	1 401.8	495.1	86.8	-64.7	Construction and refurbishing of Schools, Community Centres, Homes for Elderly/Children and Water Sanitation.
Port Authority of Jamaica (PAJ)	4 387.6	5 459.6	1 575.6	469.5	82.1	131.9	-82.5	60.7	Funds were used for infrastructure; docks & berths and commercial activities.
Urban Development Corporation Limited (UDC)	1 839.9	2 611.1	1 570.6	372.3	345.5	315.9	-7.2	-8.6	The primary activities being financed included networking and electrical work at Dunn's River ticketing Office, renovation of Kingston Craft Market and work on the Simon Bolivar Cultural Centre.

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 and (US\$1: \$113.35) for 2014

r - revised

Source : Compiled by the Planning Institute of Jamaica from information received from various institutions

- Build-on-Own Land which amounted to 329 units, an increase of 1.5 per cent compared with 2013.
- Home Owners Loans, up 15.4 per cent to 307 units in 2013.
- First Step Project units totalled 199 relative to 108 in 2013.

Starts by Private Developers under the Interim Financing Agreement with the NHT increased by 43.7 per cent to 388 units. The projects by Private Developers included:

- 15 units at Whitehall Phase III, Westmoreland
- 25 units at Holland Estate Phase I, Trelawny
- 348 units at Jacaranda Phases II & III, St. Catherine.

TABLE 14.2
MAJOR PERFORMANCE INDICATORS OF THE CONSTRUCTION INDUSTRY, 2010 - 2014

	2010	2011	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013	2014
Total Housing Starts	2 674.0	6 405.0	1 790	2 896	2 034	61.8	-29.8
Number of Housing Starts by NHT	1 278.0	1 466.0	1 790	1 689	1 548	-5.6	-8.3
Total Housing Completions	2 999.0	3 644.0	4 334	5 560	2 283	28.3	-59.0
Number of Housing Completions by NHT	1 452.0	1 618.0	2 676	1 621	1 613	-39.4	-0.5
Total Number of Mortgages	8 292.0	14 090.0	11 684	17 308	13 428	48.1	-22.4
Number of Mortgages by NHT	6 806.0	7 425.0	7 205	7 916	6 324	9.9	-20.1
Total Value of Mortgages (\$m)	24 673.8	27 955.7	28 698.9	37 688.3	34 167.1	31.3	-9.3
Value of Mortgages by NHT (\$m)	15 714.6	20 671.8	19 387.3	21 697.3	17 711.1	11.9	-18.4
Commercial Bank Loans & Advances (\$m)	21 962.6	18 487.9	21 115.4	23 217.9	24 371.1	10.0	5.0
Cement Supply ('000 Tonnes)	725 764	716 168	698 586	702 515	721 987	0.6	2.8
Cement Imports ('000 Tonnes)	197.4	166.4	157.0	101.8	124.7	-35.2	22.5
Silica Sand Production ('000 tonnes)	13.0	14.0	13.9	15.8	15.8	13.7	0.0
Limestone Production ('000 tonnes)	1 956.1	2 451.0	2 232.6	1 949.4	2 138	-12.7	9.7
Sand and Gravel Production ('000 tonnes)	2 750.0	2 475.2	2 599	1 902.4	2 118	-26.8	11.3
Paint Production ('000 ltrs)	9 249.0	9 765.0	9 479	9 401	8 612	-0.8	-8.4
Employment (annual average '000 persons)	89.6	88.2	81.1	83.0	80.9	2.3	-2.5

r - revised

p - preliminary

Source: Compiled by the Planning Institute of Jamaica

Housing Completions⁵: The total number of Housing Completions fell by 59.0 per cent to 2 283 units (see Table 14.2). This performance was influenced mainly by declines in completions by the HAJ as well as Private Developers under the Interim Financing Agreement with the NHT. There were no completions by the HAJ compared with 1 928 units in 2013. Under the Interim Financing Agreement with the NHT, Private Developers completed 670 units relative to 2 011 units for 2013. The volume of units completed by the NHT also fell from 1 621 units to 1 613 units.

Employment

The average employment for the industry declined from 83 025 persons to 80 925 persons in 2014 (see Table 14.2). This represented 7.2 per cent of the average total employed labour force compared with 7.5 per cent for 2013. The lower average employed labour force in the industry resulted from decreases in both the average number of males and females employed. The average number of males who worked in the industry declined from 80 150 to 78 550 persons, while the average number of females was 2 375 persons, a decline of 500 persons compared with 2013.

Construction Inputs

- Increased production of some inputs was recorded. These included:
- Sand & Gravel production which grew by 11.3 per cent to 2 118.0 kilo tonnes

- Limestone⁶ production which increased by 9.7 per cent to 2 138.0 kilo tonnes from 1 949.4 kilo tonnes
- Cement production which grew by 0.6 per cent to 830.1 kilo tonnes

However, the production of paint declined by 8.4 per cent to 8.6 megalitres while output of silica sand remained flat at 15.8 kilo tonnes (see Table 14.2).

FINANCING TO THE INDUSTRY

Mortgage Financing

Total value of mortgages amounted to \$34.2 billion which was a decline of 9.3 per cent relative to 2013 (Table 14.3). This was influenced mainly by a decline in the value of mortgages provided by the NHT which totalled \$17.7 billion compared with \$21.7 billion. Declines were also recorded for the value of mortgages disbursed by Building Societies and Life Insurance companies. The value of mortgages disbursed by Building Societies totalled \$12.1 billion (down 1.4 per cent) and by Life Insurance companies totalled \$0.4 billion (down 10.4 per cent). However, Credit Unions recorded an increase of 20.7 per cent to \$4.0 billion in mortgage disbursements.

The number of mortgages disbursed in the industry fell by 22.4 per cent to 13 428 loans which was due to declines by all institutions, except Life Insurance companies. The largest decline was recorded for Credit Unions, which granted 5 525 loans, a decline of 28.2 per cent. A total of 6 324 loans were

5. Housing completions refer to the completion of basic infrastructure such as water, light and drainage on a housing solution.

6. Limestone is also widely used in the production of alumina.

TABLE 14.3
MORTGAGES BY MAJOR AGENCIES, 2010-2014
\$ million

Entities	Jan-Dec 2010		Jan-Dec 2011 ^r		Jan-Dec 2012		Jan-Dec 2013 ^r		Jan-Dec 2014 ^p	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
NHT	6 806	15 714.6	7 425	20 671.8	7 205	19 387.3	7 916	21 697.3	6 324	17 711.0
Building Societies ^a	1 479	8 909.9	918	5 171.4	1 281	7 399.4	1 649	12 264.9	1 526	12 099.4
Life Insurance	7	49.3	22	144.6	43	254.5	51	450.8	53	403.8
Credit Unions	-	0.0	5 725	1 967.9	3 155	1 656.6	7 692	3 275.3	5 525	3 952.9
Total	8 292	24 673.8	14 090	27 955.7	11 684	28 698.9	17 308	37 688.3	13 428	34 167.1

r - revised

p - preliminary

a - values for 2011 include amount provided by only two of the mortgage institutions

Source: Compiled by the Planning Institute of Jamaica

disbursed by the NHT and 1 526 loans by Building Societies, representing reductions of 20.1 per cent and 7.5 per cent, respectively (see Table 14.3).

Total disbursements by the **Jamaica Mortgage Bank (JMB)** to the developers in the industry stood at \$576.1 million compared with \$546.8 million in 2013.

Other Financing

Commercial Bank Loans & Advances to the industry⁷ as at the end of December 2014 totalled \$24.4 billion. This was relative to loans and advances of \$23.2 billion at the end of December 2013.

At the end of December 2014, loans from **Institutions Licensed under the Financial Institutions Act** to the industry totalled \$1.0 billion compared with \$0.6 billion at the end of December 2013.

OUTLOOK

Real value added for the Construction industry is projected to increase for 2015 which is predicated on an expansion of

Civil Engineering activities under the Other Construction category. The MIDP which commenced in 2014 is expected to drive the performance of this component of the industry. In addition, work will continue on the Caymanas to Linstead and Moneague to Ocho Rios segments of Highway 2000 with completion scheduled for 2016. The Building Construction component of the industry is also expected to increase based on the improved performance of the Non-Residential and Residential subcategories. This growth is projected to stem primarily from the continuation of hotel construction and renovation with a targeted completion date in 2015. Court Yard by Marriot is expected to complete 130 rooms by 2015 which will feature innovative technology designed to conserve energy. The renovation of Hyatt Ziva and Zilara, formerly the Ritz Carlton Hotel, will be re-launched in 2015 with an additional 100 suites to the existing structure which already has 427 rooms. Additionally, the Residential subcategory should see starts and completions from the HAJ. Projects include Luana Gardens, which started in March 2014, and has a completion date set for May 2015. ■

7. Commercial Banks lend under three categories: Construction; Land Development; and Land Acquisitions.



ENERGY, ELECTRICITY & WATER

INTRODUCTION

The Electricity & Water Supply Industry contracted by 1.2 per cent relative to 2013, the third consecutive year of decline (Figure 15A). The lower real value added stemmed from contractions in electricity consumption¹ and water production due primarily to reduced electricity demand and severe drought conditions, respectively.

Approximately 4 107.5 gigawatt hours (GWh)² of electricity was generated compared with 4 141.6 GWh in 2013. The lower output emanated from a 7.9 per cent reduction to 1 656.8 GWh in generation from non-Jamaica Public Service (JPS) sources which represented 40.3 per cent of total generation, a decline from 43.4 per cent in 2013. Production by JPS expanded by 4.6 per cent to 2 450.7 GWh, accounting for 59.7 per cent of total generation, an increase from 56.6 per cent attained in 2013. The heat rate³ fell by 2.6 per cent to 9 631 kilojoules per kilowatt hour (kJ/kWh), marking the fourth consecutive year of improvement in generating efficiency. Electricity sales decreased by 0.9 per cent to 2 997.8 GWh while revenue increased by 2.2 per cent to \$112.5 billion.

The National Water Commission (NWC) produced approximately 296 139.5 megalitres of water, 1 889.7

megalitres less than in 2013. Of the total production, an estimated 82 829.2 megalitres were consumed relative to 92 286.2 megalitres in 2013. The number of water connections increased by 1.6 per cent to 466 695. The utility’s billed revenue increased to \$26 272.9 million from \$22 326.5 million in 2013.

Global crude oil supply increased by 2.1 per cent to 93.3 million barrels per day (mbd). While output from the Organization of Petroleum Exporting Countries (OPEC) was unchanged, production from non-OPEC countries increased. World oil demand grew by 0.8 per cent to 92.5 mbd, due to higher demand from the Non-Organization for Economic Corporation and Development (Non-OECD) countries. The average spot peak price of crude oil on the international market fell from US\$104.08 per barrel in 2013 to US\$96.24 per barrel in 2014. The local average billing prices for most petroleum products surveyed in 2014 were higher than 2013.

ENERGY POLICIES AND PROGRAMMES

The government, through the Ministry of Science, Technology, Energy & Mining (MSTEM) continued to pursue various paths towards achieving the vision of the National Energy Policy (NEP). This vision, aligned to *Vision 2030 Jamaica – National Development Plan*, seeks to create “a modern, efficient, diversified and environmentally sustainable

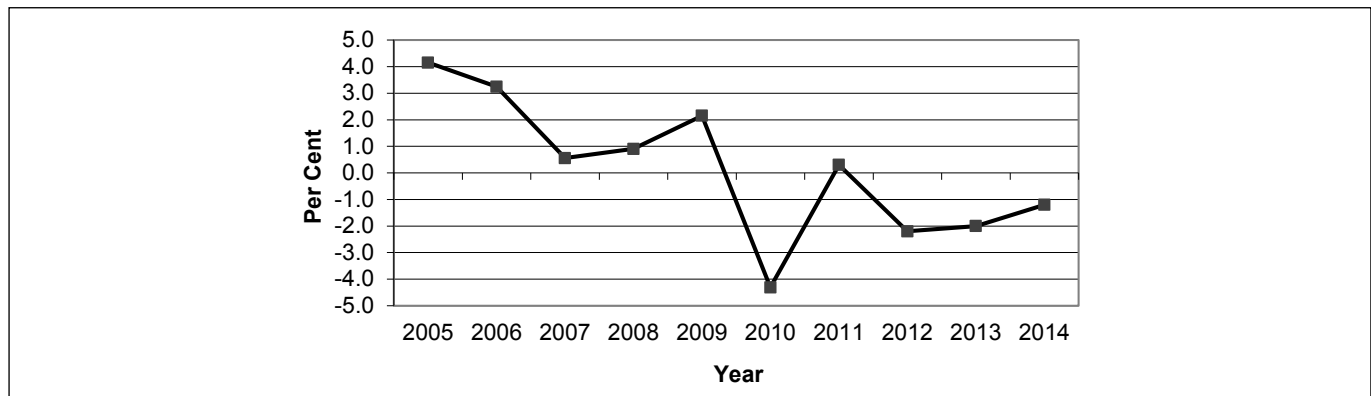


FIGURE 15A: REAL VALUE ADDED GROWTH RATES FOR THE ELECTRICITY & WATER SUPPLY INDUSTRY, 2005–2014

1. Based on the System of National Accounting 2008, electricity consumption is being used in GDP calculation for the electricity component of the Industry.
2. Gigawatt hours is a unit of measurement for Electrical Energy. 1GWh=1 million kWh=1 billion Wh
3. Heat rate reflects the efficiency of a power plant to produce energy. It indicates the amount of fuel required to generate one unit of electricity. Therefore a lower heat rate reflects a more efficient plant.

energy sector...” This is expected to facilitate the provision of more affordable energy supplies, an improved competitive base, as well as sustainable growth and development for industries. During the year, activities geared at facilitating these outcomes continued to focus on modernizing the energy infrastructure through the injection of new generating capacity and the diversification of fuel sources; improving energy conservation and efficiency (ECE); enhancing energy security; promoting and facilitating competition in the electricity sub-industry; and developing the renewable energy (RE) sub-industry.

Modernization of the Energy Infrastructure/Diversifying Fuel Source

The emergence of Energy World International (EWI) as the preferred bidder in 2013 to lead the expected roll-out and commissioning of the 360 MW Power Plant was discontinued. This was due to the preferred bidder not fulfilling certain conditions of the award. Subsequently, efforts regarding the modernizing and diversification were boosted with the approval by Cabinet in June 2014 of the Electricity Sector Enterprise Team (ESET). The Team, in consultation with the Office of the Utilities Regulation (OUR), the Jamaica Public Service (JPS) and MSTEM, was tasked to manage the procurement process for new electricity generating capacity. Included in its mandate were:

- Preparation of Optimized Integrated Resource Plan
- Selection of Projects for Implementation
- Development of Financing Strategies
- Procurement Process
- Contract Negotiation
- Oversight and Facilitation of Approvals and Licensing
- Implementation Monitoring
- Reports, Consultations and Public Education.

In September 2014, ESET submitted its findings of the Rapid Assessment and Least Cost Expansion Plan along with indicative proposals for base load power generation to Cabinet as follows:

- JPS Old Harbour and Hunts Bay – replace the existing 292 MW HF Oil Power Plants at Old Harbour and Hunts Bay with a 190 MW Combined Cycle Power Plant fuelled with LNG
- JPS Bogue – convert JPS’s newest plant, the Bogue Power Station to a 115 MW Combined Cycle by the end of Q4 2015 from Automotive Diesel Oil (ADO) initially to Propane

- Bauxite/Alumina Co-Generation Projects: Jamalco Energy Solution and UC Rusal to sell excess generation to the grid.

The work of ESET was facilitated by changes to the All Island Electricity License secured through negotiations between the government and JPS. This involved the removal of Condition 18 of the licence to allow JPS to replace obsolete equipment without facing competition on the procurement of such equipment. The complementary Condition 6.4 was also replaced with a clause that gives JPS the right of first refusal to replace its obsolete equipment. This adjustment gives the utility more overall control of decision making on its development options going forward. In addition, work to revise the Electricity Act was pursued during the year. The Electricity Act is to be updated to clarify and codify the roles and responsibilities of the main actors in the sector, including the government, the regulator, the utilities and the independent power producers. At the end of the year, work was far advanced on the proposed amendments.

Improvement in Energy Efficiency & Conservation (EEC)

The government, in partnership with the Inter-American Development Bank (IDB), continued implementation activities under the *EEC Programme*. Under the programme, which started in 2012, retrofits and energy efficiency improvements have been carried out at several facilities across the public sector. The areas targeted were building envelope insulations and air conditioning. Achievements during 2014 included the installation of:

- Cool Roof Solution at two facilities, including a major public hospital, bringing the total number of facilities retrofitted to date to 14. This amounted to 206 687 square feet (sq. ft.)
- Solar Control Film at eight facilities, including educational, health and court facilities, bringing total number of facilities retrofitted to 42 buildings, amounting to 70 712 sq. ft. There has been an average 3.0 per cent reduction in energy consumption at facilities which received Cool Roof and Solar Film applications with an average payback period of 18 months
- Energy efficient air conditioning solutions at four facilities, with an average of three buildings per facility. One facility is now completed and showing an average of 30.0 per cent reduction in energy consumption.

Lighting contracts are under consideration for the replacement of inefficient lighting with more energy efficient and optimized lighting solutions in public sector facilities. In addition, training seminars and workshops in energy conservation and procurement guidelines were completed for 73 government agencies and approximately 630 persons trained.

The Petroleum Corporation of Jamaica (PCJ), as part of its efforts to contribute to the reduction of the government's energy costs, continued to finance and implement energy efficiency projects in public sector facilities at the:

- Spanish Town Hospital in St. Catherine, where an air conditioning unit was installed on the Maternity Wing of the hospital at a cost of \$8.4 million. The new system is expected to reduce the hospital's electricity usage by 77 440 kWh per annum, which should cut the institution's electricity bill by close to \$3.52 million per year
- Annotto Bay Hospital in St. Mary, where the air conditioning systems serving two operating theatres and the Accident and Emergency (A&E) Department were replaced. This project, which represents an investment of \$12.0 million, is expected to reduce electricity usage by 82 947 kWh per annum, generating savings of approximately \$3.82 million
- National Irrigation Commission (NIC), where Variable Frequency Drives were installed at six NIC pumping stations. This is expected to reduce electricity consumption as a result of improvement in power factor. The estimated energy saving is 440 kVA per year and the projected savings of approximately \$18.0 million per annum
- Ardenne and Norman Manley High Schools, where Light Emitting Diodes (LEDs) lights were installed. The utilisation of these will result in savings of \$4.9 million per annum.

In addition, the procurement process was initiated for similar projects at the Glenmuir High School in Clarendon and the Old Harbour High School in St. Catherine. Overall, the interventions carried out by the PCJ in 2014/15 should result in savings in excess of \$30.0 million in the public sector energy bill.

Energy Security and Efficiency Enhancement

Work under *Energy Security and Efficiency Enhancement Project (ESEEP)*⁴, being implemented in partnership with the World Bank, continued under its three components: Strengthening the regulatory and institutional framework to improve the energy sector's performance, increase private investment, and support the transition to cleaner fuels such as Liquefied Natural Gas (LNG); Developing Jamaica's Energy Efficiency (EE) and RE potential through private sector investment and consumer education; and Project Management, Monitoring and Evaluation.

The key achievements for the project in 2014 included the completion of:

- Prefeasibility/Feasibility Studies for four hydro sites
- Phase 1 of the development of a Regulatory Database for Performance Benchmarking
- the Identification and Implementation of Monitoring and Benchmarking Instruments.

In addition, a disbursement of US\$2.4 million was made by the Development Bank of Jamaica (DBJ) under a Line of Credit (LoC) to SME's. Training sessions with energy sector stakeholders and academia regarding hydro financial modelling were also conducted.

The UNDP-supported *Capacity Development for Energy Efficiency and Security in Jamaica Project* continued under the three components: Capacity Development in the Public Sector; Technical Assistance for Small Scale Renewable Energy; and the establishment of a Public Private Dialogue Forum. For 2014, the main activities of the project were:

- conducting of a Wind Mapping Study at 22 sites across Jamaica, which were previously identified for piloting wind power for domestic use in communities
- contracting of an independent consultant to install and commission wind turbines at two sites—Rose Hill Primary and Nazareth All Age schools.
- conducting of stakeholders' fora.

Promotion and Facilitation of Competition

Activities to facilitate the liberalisation of the national grid continued under the *Standard Offer Contract for Net Billing programme*. At the end of December 2014, some 258 licences were issued and 100 persons were connected to the grid. The pilot programme, which was set to end in May 2014, is currently being evaluated. With regard to *Power Wheeling*, the Wheeling Framework Determination, which was issued in July 2013 and was scheduled to commence in August 2013, was stalled, following an appeal from JPS to the Electricity Appeals Tribunal (EAT). The matter was heard on February 13 and 14, 2014, and the OUR's determination was set aside, it was resubmitted to the OUR for reconsideration.

Renewable Energy Development

Consistent with its policy focus on Renewable Energy (RE), the government advanced its drive to reduce the country's dependence on imported fossil fuels by infusing renewable sources into the country's energy mix. An estimated 6.3 per cent of the electricity supply mix was attributable to RE during 2014, relative to 8.0 per cent in 2013 and 2012. Further advancement of this policy objective continued. At the end of December 2014, activities were at varying stages

4. This project represents one of the key initiatives to ensure the implementation of the NEP.

of progress with respect to the three bidders recommended for energy only projects:

- **Blue Mountain Renewables LLC**, which should supply 34MW of capacity from wind power at Munro, St. Elizabeth—licence was obtained and financing arrangements are being finalized
- **Wigton Windfarm Limited**, which is slated to supply 24MW of capacity from wind power at Rose Hill, Manchester—licence was granted by MSTEM
- **WRB Enterprises Inc.**, which should supply 20MW of capacity from Solar PV from facilities in Content Village, Clarendon—Power Purchase Agreements have been agreed with JPS, permits received from the National Environmental Planning Agency (NEPA) and licence issued by MSTEM.

These RE activities fused with other key activities undertaken by the PCJ, as the organization continues to spearhead the thrust to develop Jamaica's renewable energy potential in order to provide viable alternatives for imported fossil fuels. The areas of focus in 2014 included:

- **Hydro** – work which started on the Four River Project in 2013 was further advanced with continued support from the Energy Security and Efficiency Enhancement Project (ESEEP)⁵. Full feasibility studies were conducted on the Rio Cobre River, St. Catherine; the Negro River, St. Thomas; Martha Brae River, Trelawny; and Spanish River, Portland. This followed pre-feasibility studies in 2013 which identified a combined potential of more than 20MW in generating capacity from these sources. The MSTEM and PCJ are now seeking to use the findings from these studies, as well as data from previous assessments of Laughlands Great River, in St. Ann and Great River in St. James, to create investment packages for the development of about 26MW in hydropower. If this potential is fully exploited it would double the country's hydro generating capacity. In addition, the combined impact of the six rivers could result in 95.7 GWh in generation annually which would reduce Jamaica's oil demand by more than 56 300 barrels per year, yielding savings of almost \$329.0 million.
- **Biofuels** – the five-year biodiesel pilot project, to determine the production parameters for biodiesel from castor and jatropha plants, reached its 4th year. It is being undertaken, through collaboration with PCJ and the Ministry of Agriculture and Fisheries, with Researchers at Bodles Agricultural Research Station in St. Catherine.

- **Wind** – the Wind Power Irrigation Project, executed through the National Irrigation Commission (NIC) with support from MSTEM and the Organization of American States (OAS), provided grant funding of US\$60 000 and was completed in October 2014. The specific objective of the project was to evaluate the feasibility of utilizing wind technology to reduce the electricity cost for providing irrigated water to the farmers. The project accomplished the following:
 - collected and analysed 12 months of wind data by the University of the West Indies
 - prepared Wind Resource Assessment Report, which outlined the findings from the wind data analysed
 - conducted two Wind Energy Capacity Development Training Workshops for key stakeholders to increase knowledge and understanding on the essential elements of wind project development, operation, and maintenance within the context of using the power for irrigation purposes
 - Peer Review on Wind Resource Assessment.
- **Solar** – a contract valued at approximately \$62.0 million was awarded for the procurement of the systems for a Solar PV Project under which photovoltaic systems will be installed at 15 schools and three public sector institutions. Collectively, the 18 systems will provide 344 000 kWh hours per year, resulting in savings of more than \$15.0 million per year on the public sector energy bill, for the first year. The solar PV systems are grid-tied and expected to supply the surplus electricity generated (beyond the electrical needs of the facility) to the national utility grid when conditions allow. The export of electricity to the utility grid is anticipated to occur especially on weekends and holidays, which would allow the benefiting institutions to earn revenue by generating electricity to sell back to the grid.

The **Caribbean Hotel Energy Efficiency and Renewable Energy Action – Advanced Program (CHENACT-AP)**, a regional RE Initiative also continued during 2014. The Bahamas and Barbados also participated in the project 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 following activities were completed:

5. See ESSJ 2013.

- detailed energy audits were conducted in 10 hotels in Jamaica, including the establishment of energy consumption patterns and baseline for further analysis
- twenty-two of 30 hotels and attractions were registered for detailed energy audits
- nine of 10 hotels and attractions were registered for walk-through audits.

In addition, a consulting firm was identified to implement the project work plans in The Bahamas, Jamaica and Barbados.

PERFORMANCE

International Oil Market

The global oil market was impacted by several factors during the year, including:

- geopolitical tensions which caused crude oil prices to increase during the first half of the year
- supply and demand factors, primarily the continued production of shale oil on the market by the USA
- weaker than expected performance of some major economies
- currency related issues as the US dollar strengthened.

For 2014, world oil demand increased by 0.8 per cent to 92.5 million barrels per day (mbd) compared with 2013 (Table 15.1). This marked the 5th consecutive year of growth and was supported by increased demand in non-OECD countries

to facilitate energy-intensive industrial and manufacturing activities. All countries in the non-OECD category recorded higher demand, led by China with an absolute increase of 0.3 mbd, followed by Former Soviet Union and Latin America, both with an absolute increase of 0.2 mbd (see Table 15.1).

Oil demand fell by 1.1 per cent to 45.6 mbd in OECD countries, reflecting a 2.2 per cent decline in Europe and a 2.4 per cent reduction in Asia Oceanic, while the Americas remained relatively flat at 0.0 per cent.

World oil supply increased by 1.9 mbd for 2014, reflecting higher production by non-OPEC (up 3.7 per cent to 56.6 mbd) whereas supply from OPEC remained relatively flat at 36.7 mbd. The out-turn by non-OPEC resulted from an 8.1 per cent increase to 22.6 mbd in OECD supply, pushed by a 9.4 per cent expansion in production from the Americas, as supplies from Europe and Asia Oceanic remained relatively flat (Table 15.2). The continued expansion of unconventional oil production in the USA (shale liquid production) and Canada (oil from tar sands) were the main drivers behind this increased supply from North America. The non-OECD category increased by 0.7 per cent to 29.7 mbd, pushed mainly by increased supply from Latin America and Global Biofuels categories. Production from the category Others declined, while the remaining categories were relatively unchanged (see Table 15.2).

The spot peak price of crude oil on the international market fell by 7.5 per cent to average US\$96.24 per barrel. This out-turn reflected a fall in prices in all three main benchmark markets:

TABLE 15.1
WORLD OIL DEMAND 2010–2014
(Million Barrels per day)

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
OECD	46.9	46.5	45.9	46.1	45.6	0.4	-1.1
Americas	24.1	24.0	23.6	24.1	24.1	2.1	0.0
Europe	14.7	14.3	13.8	13.7	13.4	-0.7	-2.2
Asia Oceania	8.2	8.2	8.5	8.3	8.1	-2.4	-2.4
TOTAL NON-OECD	41.4	42.5	44.6	45.7	46.8	2.5	2.4
Former Soviet Union	4.1	4.4	4.5	4.7	4.9	2.2	4.3
Latin America	6.1	6.2	6.4	6.6	6.8	3.1	3.0
China	8.9	9.3	9.8	10.1	10.4	3.1	3.0
Others ^a	22.2	22.6	23.8	24.2	24.8	1.7	2.5
TOTAL DEMAND	88.4	89.0	90.5	91.8	92.5	1.4	0.8

a - Other Asia, Middle East, Africa, Europe

p - preliminary

r - revised

Discrepancies in table may be due to rounding.

TABLE 15.2
WORLD OIL SUPPLY 2010 - 2014
(Million barrels per day)

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
OPEC	34.7	35.8	37.5	36.7	36.7	-2.1	0.0
OECD Supply	18.9	19.0	19.8	20.9	22.6	5.6	8.1
Americas	14.1	14.6	15.8	17.1	18.7	8.2	9.4
Europe	4.2	3.8	3.5	3.3	3.3	-5.7	0.0
Asia Oceania	0.7	0.6	0.6	0.5	0.5	-16.7	0.0
NON-OECD Supply	29.9	29.9	29.5	29.5	29.7	0.0	0.7
Former Soviet Union	13.5	13.5	13.7	13.9	13.9	1.5	0.0
Latin America	4.1	4.2	4.2	4.2	4.4	0.0	4.8
China	4.1	4.1	4.2	4.2	4.2	0.0	0.0
Others ^a	8.1	8.0	7.4	7.3	7.1	-1.4	-2.7
Processing Gains	2.1	2.1	2.1	2.2	2.2	4.8	0.0
Global Biofuels	1.8	1.9	1.9	2.0	2.2	5.3	10.0
TOTAL NON-OPEC	52.7	52.9	53.3	54.6	56.6	2.4	3.7
TOTAL SUPPLY	87.4	88.7	90.8	91.4	93.3	0.7	2.1

a. - Other Asia, Middle East, Africa, Europe

p - preliminary

r - revised

Discrepancies in table may be due to rounding.

Source: International Energy Agency

- UK Brent, down 9.1 per cent to US\$98.94 per barrel
- Dubai, down 8.3 per cent to US\$96.66 per barrel
- West Texas Intermediate (WTI), down 4.9 per cent to US\$93.11 per barrel.

Average monthly prices started the year at US\$102.10 in January, peaked at US\$108.40 in June and ended the year at US\$60.70. The higher prices during the first half of the year reflected supply disruption concerns stemming from conflicts in Ukraine and Libya as well as tensions in the Middle East. However, prices began trending down in the second half of the year as the market responded to increased supply of oil from shale production in the USA.

During the year, crude oil prices were impacted by a combination of factors, mainly:

- supply issues stemming from an over-supply from the Middle East and the Atlantic Basin, which while eased concerns over supply disruptions, served to frustrate the aforementioned production method being employed by the USA .
- demand issues related to the slowing down in economic performance by some of the largest oil-consuming countries, which resulted in lower demand for oil

- the appreciation of the US dollar which may have contributed to the downward pressure on crude oil prices, as demand declined in countries that experienced a weakening in the purchasing power of their currencies.

Domestic Market

Average Billing Prices

The average billing prices for most of the petroleum prices surveyed on the local market increased relative to 2013, reflecting the depreciation in the local exchange rate, which outweighed the impact of the fall in world crude oil prices. Prices ranged between \$55.10 per litre for Liquid Petroleum Gas (LPG) and \$124.20 per litre for Kerosene compared with a range of \$49.45 per litre and \$115.30 per litre for the respective products in 2013. The price of Ultra Low Sulphur Diesel (ULSD)—which was introduced to the market on June 24, 2013—decreased by 9.6 per cent to average \$127.10 (Table 15.3).

Production

Output for all of the petroleum products surveyed declined relative to 2013 due primarily to the shutdown of the Refinery during the period August–October 2014 to facilitate scheduled maintenance. Production levels decreased as follows:

- Marine Diesel Oil/ADO Bunker by 26.0 per cent to 126 161 barrels

TABLE 15.3
AVERAGE BILLING PRICES FOR SELECTED PETROLEUM PRODUCTS, 2010–2014
 (\$/litre)

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
ADO	81.12	99.81	104.85	114.71	121.10	9.4	5.6
Fuel Oil	45.44	61.41	67.00	72.60	76.80	8.4	5.8
LPG	40.02	49.27	45.08	49.45	55.10	9.7	11.4
E10 - 87	81.10	95.87	102.01	111.02	119.10	8.8	7.3
E10 - 90	82.78	97.52	103.67	112.68	120.80	8.7	7.2
Kerosene	82.77	103.06	106.50	115.66	124.20	8.6	7.4
USLD	n/a	n/a	n/a	140.62	127.1	-	-9.6

n/a - not applicable as product was introduced in 2013

r - revised

p - preliminary

Source: Compiled from data provided by Petrojam Refinery

- Automotive Diesel Oil by 24.0 per cent to 938 991 barrels
- E10–87 by 17.0 per cent to 876 609 barrels
- Kerosene by 17.0 per cent to 634 319 barrels
- Fuel Oil by 17.0 per cent to 3 861 507 barrels
- Liquid Petroleum Gas by 5.0 per cent to 65 248 barrels
- Asphalt by 1.0 per cent to 107 610 barrels.

Imports of Crude Oil & Petroleum Products

Relative to 2013, the volume of crude oil imports fell by 19.2 per cent to approximately 6.9 million barrels in 2014 (Table 15.4A). The average cost per barrel of crude oil

decreased by 9.7 per cent to US\$93.10. As a result, the value declined by 27.1 per cent to US\$642.6 million. Venezuela continued to be Jamaica's largest supplier of crude oil—although supplies fell by 12.6 per cent relative to 2013—as the government continued to benefit from the favourable terms of the 2004 Petro-Caribe Energy Cooperation Agreement⁶. Imports from Mexico contracted by 46.2 per cent to 0.9 million barrels.

To meet the demand, Petrojam imported approximately US\$851.9 million worth of finished products, 4.5 per cent more than in 2013 (Table 15.4B). The higher cost was due primarily to higher volumes since international oil prices fell during the year.

Approximately US\$290.0 million worth of petroleum products were imported by the Bauxite/Alumina sub-industry

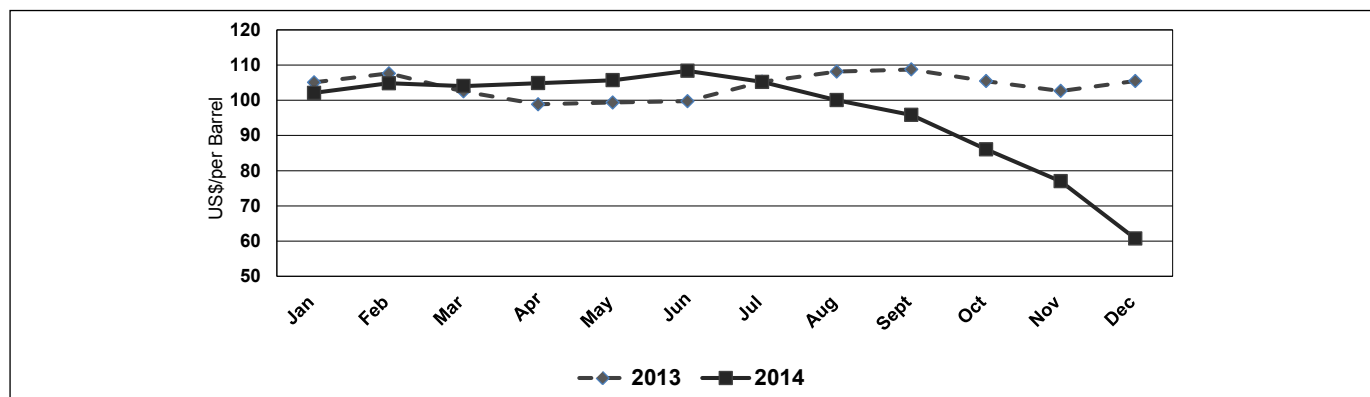


FIGURE 15B: MONTHLY AVERAGE SPOT PEAK PRICE MOVEMENTS FOR CRUDE OIL, 2013, 2014

6. 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 15.4A
VOLUME AND VALUE OF CRUDE OIL IMPORTS, 2012–2014

	2012 ^r		2013 ^r		2014 ^p		% Change		% Change	
	Volume	Value	Volume	Value	Volume	Value	2013/2012	2013/2012	2014/2013	2014/2013
	(‘000 Bls.)	(‘000 US \$)	(‘000 Bls.)	(‘000 US \$)	(‘000 Bls.)	(‘000 US \$)	Volume	Value	Volume	Value
REFINERY										
Venezuelean Crude	7 116.4	722 656.0	6 816.3	699 132.9	5 972.0	548 442.3	-4.2	-3.3	-12.6	-21.6
Mexican Crude	1 700.5	176 580.5	1 724.5	181 914.3	928	94 185.5	1.4	3.0	-46.2	-48.2
TOTAL CRUDE OIL	8 816.9	899 236.0	8 540.8	881 047.2	6 900.0	642 627.8	-3.1	-2.0	-19.2	-27.1
Average cost per barrel for crude oil (US\$)		102		103.1		93.1		1.1		-9.7

Bls - Barrels
US\$ - United States Dollars
p - preliminary
r - revised

Source: Compiled from data supplied from the Petrojam Refinery.

compared with US\$335.2 million in 2013 (see Table 15.4B). The value of products imported by the petroleum marketing companies was US\$59.4 million compared with US\$114.6 million in 2013, reflecting the general sluggish demand in the market. The country's oil bill (total value of crude oil and refined product imports) decreased by 14.1 per cent to

US\$1.8 billion, reflecting the fall in crude oil prices during the second half of the year (see Table 15.4B).

Petrojam Sales

The sales of petroleum products by Petrojam for 2014 were as follows:

- Asphalt – 85 057 barrels (down 22.0 per cent)

TABLE 15.4B
VOLUME AND VALUE OF PETROLEUM PRODUCTS IMPORTS, 2012–2014

	2012 ^r		2013 ^r		2014 ^p		% Change		% Change	
	Volume	Value	Volume	Value	Volume	Value	2013/2012	2013/2012	2014/2013	2014/2013
	(‘000 Bls.)	(‘000 US \$)	(‘000 Bls.)	(‘000 US \$)	(‘000 Bls.)	(‘000 US \$)	Volume	Value	Volume	Value
PETROJAM										
LPG	758.4	55 145.0	611.5	40 173.4	513	33 402.0	-19.4	-27.1	-16.1	-16.9
E10 – 87	1 531.1	194 712.8	1 717.1	209 182.0	1 242.1	135 995.5	8.7	4.0	-27.7	-35.0
E10 – 90	289.0	37 715.2	458.6	55 046.5	1 122.3	128 966.1	77.1	63.6	144.7	134.3
Jet Fuel/Kerosene	721.6	96 220.1	667.0	82 845.1	871	102 690.9	-15.2	-17.9	37.5	24.0
Automotive Diesel Oil	1 832.4	235 291.0	1 780.4	222 338.2	2 119.2	226 776.8	-2.8	-5.5	19.0	2.0
Heavy Fuel Oil	2 112.4	226 563.3	2 091.7	205 831.0	2 445.9	224 028.4	-1.0	-9.2	16.9	8.8
BAUXITE COMPANIES										
Bunker C	1 380.1	141 223.8	1 429.4	137 362.6	1 160.0	126 057.7	3.6	-2.7	-18.8	-8.2
Low Vanadium ADO	1 280.2	129 740.7	2 140.8	197 837.2	1 807.7	163 899.8	67.2	52.5	-15.6	-17.2
MARKETING COMPANIES										
Refined Products	1 241.6	157 574.3	1 085.9	109 994.9	614	58 388.1	-12.5	-30.2	-43.5	-46.9
Lubricants	15.5	5 098.8	15.9	4 586.6	2.8	999.8	2.6	-10.0	-82.4	-78.2
TOTAL CRUDE		899 236.0		881 047.2		642 627.7		-2.0		-27.1
GRAND TOTAL		2 178 521.0		2 146 244.7		1 843 832.8		1.5		-14.1

Bls - Barrels
US\$ - United States Dollars
p - preliminary
r - revised

Source: Compiled from data supplied from the Petroleum Refinery.

- Liquid Petroleum Gas – 560 301 barrels (down 18.0 per cent)
- Naptha – 360 barrels (down 9.0 per cent)
- E10-87 – 1 990 320 barrels (down 7.0 per cent)
- Fuel Oil – 5 064 237 barrels (down 5.0 per cent)
- E10-90 – 1 620 927 barrels (up 26.0 per cent)
- Kerosene – 7 029 (down 30.0 per cent)
- Automotive Diesel Oil (ADO) – 2 719 206 barrels (up 3.0 per cent)
- Marine Diesel Oil / ADO Bunker – 62 823 barrels (up 1 033 per cent)

The reduction in sales for some products was due for the most part to reduced demand. The contraction in the sale of Asphalt may be attributed to the completion of some major projects. Whereas no Turbo Fuel was sold in 2013, approximately 794 502 barrels were sold in 2014.

Energy Consumption

Jamaica's total energy consumption increased marginally to 20 400 000 Barrel of Oil Equivalent (BOE) from 20 365 000 BOE in 2013. This was caused by a 3.0 per cent increase to 1 216 000 BOE in consumption from Alternative Energy sources, while consumption from petroleum-based sources was relatively flat (see Table 15.5). Increased consumption from Alternative Energy sources reflected higher usage from bagasse which outweighed decreased consumption from all other sources. A 14.0 per cent increase to 2 281 000 barrels in consumption from Turbo Fuel was counterbalanced by lower consumption from all other petroleum-based sources (see Table 15.5).

Petroleum consumption for most activities was lower compared with 2013 (Table 15.6). Road & Rail Transportation recorded the largest absolute decline of 477 331 barrels. Electricity Generation followed with an absolute decline of 321 525 barrels reflecting reflected weakened demand, resulting from increased conservation practices as well as the increasing number of customers using alternative energy

TABLE 15.5
JAMAICA'S TOTAL ENERGY CONSUMPTION, 2010–2014

ENERGY SOURCE	UNIT OF MEASURE (*000 Barrels)	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
							2013 2012	2014 2013
PETROLEUM BASED								
	“	0	0	3	1	1	-66.7	0.6
Turbo Fuel	“	2 017	1 879	1 795	2 000	2 281	11.4	14.1
LPG	“	939	974	953	897	800	-5.9	-10.8
Kerosene	“	13	13	11	10	7	-9.0	-30.0
E10-87	“	2 876	2 742	2 690	2 721	2 405	1.1	-11.6
E10-90	“	1 417	1 399	1 448	1 664	1 571	14.9	-5.6
ADO	“	3 545	3 724	3 584	3 249	3 085	-9.4	-5.0
ADO Bunker	“	178	165	157	138	128	-12.4	-7.2
Fuel Oil	“	9 480	10 105	9 226	9 119	8 922	-1.2	-2.2
TOTAL PETROLEUM	“	20 465	21 002	19 868	19 799	19 199	-0.3	-3.0
TOTAL PETROLEUM - BARRELS OF OIL EQUIVALENT (BOE)		19 449	19 807	19 280	19 183	19 183	-0.5	0.0
ALTERNATIVE ENERGY								
Hydropower	MWh	152	152	151	124	111	-17.9	-10.5
	(*000 BOE)	94	94	93	77	69	-17.2	-10.4
Wind		53	91	107	115	105	7.5	-8.7
		33	57	67	71	65	6.0	-8.5
Coal	(*000 Tonnes)	54	65	56	89	80	58.9	-10.1
	(*000 BOE)	271	327	284	408	406	43.7	0.5
Charcoal - BOE	(*000 BOE)	n/a	n/a	n/a	n/a	n/a	-	-
Bagasse - BOE	(*000 BOE)	418	579	570	626	677	9.8	8.1
Fuelwood - BOE	(*000 BOE)	n/a	n/a	n/a	n/a	n/a	-	-
ALTERNATIVE ENERGY - BOE	(*000 BOE)	816	1 057	1 014	1 182	1 216	16.6	2.9
TOTAL PETROLEUM & ALTERNATIVE ENERGY	(*000 BOE)	20 266	20 864	20 294	20 365	20 400	0.3	0.2

r - revised

p - preliminary

n/a - not available

BOE - Barrel of Oil Equivalent

TABLE 15.6
PETROLEUM CONSUMPTION BY ACTIVITY, 2010–2014
(Barrels)

ACTIVITY	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
Road & Rail Transportation	5 945 220	6 012 476	6 060 084	6 341 969	5 864 638	4.7	-7.5
Shipping	1 868 525	1 634 809	1 405 023	1 370 487	1 364 651	-2.5	0.4
Aviation	2 016 839	1 878 787	1 857 082	2 001 160	2 281 941	7.8	14.0
Cement Manufacture	6 844	11 698	26 338	16 262	15 285	-38.3	-6.0
Electricity Generation	6 579 797	6 529 445	6 114 353	5 718 995	5 397 470	-6.5	-5.6
Bauxite/Alumina Processing	2 893 641	3 752 927	3 316 616	3 253 410	3 419 650	-1.9	5.1
Sugar Manufacturing	15 045	15 464	18 213	17 225	14 596	-5.4	-15.3
Residential	952 660	987 844	964 062	906 974	806 636	-5.9	-11.1
Petroleum Refining	268 039	287 237	317 309	247 189	295 593	-22.1	19.6
Other Manufacturing	59 705	97 373	43 277	27 274	18 455	-37.0	-32.3
Other	127 499	82 279	122 276	199 193	123 361	62.9	-38.1

p - preliminary
r - revised

Source: Ministry of Energy & Mining

options, such as Photovoltaics (PVs). Increased production of bauxite and alumina locally resulted in higher petroleum consumption for Bauxite/Alumina Processing, up by 166 240 barrels to 3 419 650 barrels.

Consumption levels for most petroleum products declined, reflecting weakened demand (Table 15.7). Higher prices for some products and the increased employment of conservation practices were among the factors that contributed to the lower demand. There was a positive relationship between the movements in the consumption of some products and

TABLE 15.7
PETROLEUM CONSUMPTION BY PRODUCT, 2010–2014
(Barrels)

PRODUCT	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013 2012	2014 2013
Aviation Gasoline	125	252	2 594	1 373	1 055	-47.1	-23.2
Turbo Fuel	2 016 714	1 878 535	1 854 488	1 999 787	2 280 886	7.8	14.1
Unleaded 87	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Unleaded 90	n/a	n/a	n/a	n/a	n/a	n/a	n/a
E10 - 78	2 876 269	2 742 648	2 690 130	2 721 395	2 405 350	1.2	-11.6
E10 - 90	1 417 433	1 399 303	1 447 601	1 663 926	1 571 146	14.9	-5.6
Kerosene	13 445	13 485	10 984	10 006	6 888	-8.9	-31.2
ADO	3 545 285	3 724 232	3 584 494	3 248 538	3 085 075	-9.4	-5.0
ADO Bunker	177 700	165 249	157 482	149 029	126 468	-5.4	-15.1
Ultra Low Sulphur Diesel	0	0	0	43 252	108 039	-	149.8
Heavy Fuel Oil	5 744 166	6 557 422	1 247 541	22 015	16 925	-98.2	-23.1
Fuel Oil (Bunker C)	1 690 825	1 469 560	6 051 771	7 150 289	6 969 085	18.2	-2.5
Fuel Oil (Low Vanadium)	2 044 598	2 078 058	1 927 163	1 946 371	1 936 019	1	-0.5
LPG	939 215	974 360	953 077	896 968	799 748	-5.9	-10.8
Lubricants	55 816	44 805	31 224	17 836	4 110	-42.9	-77.0
Asphalt	74 533	136 272	136 891	111 261	111 225	-18.7	0
Other	0	0	0	0	0	-	-

r - revised
p - preliminary
n/a = not applicable

Source: Compiled from data supplied by the Ministry of Energy & Mining

associated activities, including: 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).

ELECTRICITY

Generating Capacity

There was a 0.7 per cent increase to approximately 902.8 Megawatts (MW) in the country's generating capacity in 2014 (Table 15.8). This was facilitated by the commissioning of JPS' Maggotty Hydro Plant in March, 2014, which increased its capacity by 1.0 per cent to 640.6 MW. The plant cost approximately US\$36.0 million, and is anticipated to supply up to a maximum of 7.2MW of electricity to the national grid when operating at full capacity. The commissioning of the Maggotty Hydro Plant brought renewables as a proportion of net electricity generation to 6.3 per cent at the end of 2014, up from 5.9 per cent at the end of 2013. Further expansion is anticipated in the medium-term as activities related to three

new renewable energy projects progressed during the year⁷. These advances are expected to increase renewable energy input to the national grid by more than 11.5 per cent, thereby advancing the government's renewable target in electricity of 30.0 per cent by 2030.

Generation

Total electricity generation declined from 4 141.6 GWh during 2013 to 4 107.5 GWh (see Table 15.8). This resulted from a 7.9 per cent downturn to 1 656.8 GWh in electricity generation from non-JPS sources, which outweighed a 4.6 per cent expansion to 2 450.7 GWh in generation from JPS. The fall-off in output by non-JPS sources was caused by challenges associated with IPPs which resulted in the shutdown of some generating units for extended periods. There were also scheduled outages at some IPPs to facilitate maintenance activities. To offset this fall, JPS increased its generation to meet demand, boosted by the commissioning of the Maggotty Hydroelectric Power Plant in March 2014.

TABLE 15.8
JPSCo: GENERATING CAPACITY, OUTPUT, HEAT RATE & FUEL CONSUMPTION, 2010–2014

							% Change	
	UNIT	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	2013/2012	2014/2013
GENERATING CAPACITY	MW	830.5	831.0	896.5	896.5	902.8	0.0	0.7
Steam		292	292.0	292.0	292.0	292.0	0.0	0
Hydro		22.4	22.8	22.8	22.8	29.1	0.0	27.7
Slow Speed Diesel		40	40.0	40.0	40.0	40.0	0.0	0.0
Gas Turbine		279.5	279.5	279.5	279.5	279.5	0.0	0.0
Purchase Power		197	197	262.2	262.2	262.2	0.0	0.0
INDEPENDENT PRODUCERS	MW							0.0
Wartsilla		124.4	124.4	124.4	124.4	124.4	0.0	0.0
JEP/WKPP		n/a	n/a	65.5	65.5	65.5	0.0	0.0
Jamalcoa		11	11	11	11	11	0.0	0.0
JPPC		61.3	61.3	61.3	61.3	61.3	0.0	0.0
WIGTON		20	38	38	38	38	0.0	0.0
NET OUTPUT	GWh	2 793.9	2 725.7	2 593.6	2 342.2	2 450.7	-9.7	4.6
Steam		1 397.3	1 293.8	1 220.1	1 212.5	1 176.3	-0.6	-3.0
Slow Speed Diesel		276.1	289.5	280.3	286.9	284.3	2.3	-0.9
Hydro		151.7	152.1	150.7	123.7	136	-17.9	9.9
Gas Turbines		968.8	990.1	942.4	719.1	854.1	-23.7	18.8
NON-JPSCo. SOURCES	GWh	1 343.5	1 411.3	1 542.3	1 799.5	1 656.8	16.7	-7.9
TOTAL OUTPUT	GWh	4 137.4	4 137.0	4 136.0	4 141.6	4 107.5	0.1	-0.8
TOTAL SYSTEM HEAT RATE	KJ/kWh	10 183	10 120	9 965	9 884	9 624	-0.8	-2.6
TOTAL FUEL CONSUMPTION	000 Barrels	4 925.2	4 799.1	4 514.1	4 141.3	4 116.0	-8.3	-0.6
TOTAL FUEL COST	\$'000	38 478 302	50 062 489	50 189 381	48 945 003	49 312 155	-2.5	0.8

p - preliminary

r - revised

Source: Compiled from data provided by the JPSCo

7. See section on Renewable Development in Policies and Programmes.

TABLE 15.9
JPSCo: SALES & REVENUE 2010–2014

							% Change	
	Unit	2010 ^f	2011 ^f	2012 ^f	2013 ^f	2014 ^p	2013/2012	2014/2013
DISPOSAL OF ELECTRICITY								
Sales:	GWh	3 221.7	3 162.4	3 090.2	3 025.8	2 997.8	-2.1	-0.9
Residential Rate 10		1 107.0	1 051.2	1 025.1	986.2	981.5	-3.8	-0.5
General Service Rate 20		664.6	634.9	591.9	578.4	569.7	-2.3	-1.5
Power Service Rate 40		745.6	771.2	765.9	762.1	760.7	-0.4	-0.2
Large Power Rate 50		602.2	607.3	609.2	599.2	591.8	-1.6	-1.2
Street Lighting Rate 60		71.0	71.1	70.1	70.4	70.6	0.4	0.3
Other		31.2	26.8	29	29.6	23.5	2.4	-20.6
Company use	GWh	13.6	13.2	12.9	12.7	11.6	-1.6	-8.7
Line Losses & Other								
Unaccounted for Net Generation	GWh	902.1	961.3	1 032.9	1 103.2	1 098.0	6.8	-0.5
REVENUE	\$ '000	82 292 904	99 198 338	101 421 397	110 083 125.0	112 474 921.0	8.5	2.2
Residential Rate 10		30 031 136	34 960 594	35 756 371	37 577 241.0	40 262 958.0	5.1	7.1
General Service Rate 20		18 495 032	22 229 338	21 561 543	23 350 464.0	23 097 390.0	8.3	-1.1
Power Service Rate 40		17 460 761	22 256 508	23 373 364.0	25 604 866.0	25 936 621.0	9.5	1.3
Large Power Rate 50		12 939 950	16 212 062	17 146 385.0	18 577 268.0	18 351 167.0	8.3	-1.2
Street Lighting Rate 60		2 176 121	2 544 583	2 618 275.0	2 834 047.0	2 835 280.0	8.2	0.0
Other ^a		1 189 905	995 526	965 458	2 139 238.0	1 991 505.0	121.6	-6.9

a - Includes other generating and other operating revenues.

p - Preliminary

Source - Compiled from data provided by the JPSCo.

Heat Rate, Fuel Consumption and Fuel Cost

Total system heat rate declined by 2.6 per cent to 9 624 kJ/kWh, reflecting improved efficiency in the operations of JPS power plants (see Table 15.8). This marked the 4th consecutive year of improvement in heat rate and reflected, in part, the contribution of the new Maggoty Hydro Plant and West Kingston Power Plant. Total fuel consumption declined by 0.6 per cent to 4 116.0 thousand barrels, owing to lower demand. This marked the 5th consecutive year of decline. Fuel cost, however, increased by 0.8 per cent to \$49.3 billion reflecting higher oil prices during the first six months of the year (see Table 15.8).

Electricity Disposal & Revenue

Total electricity sales contracted by 0.9 per cent to 2 997.8 GWh (Table 15.9), accounting for 73.0 per cent of total generation. Line Losses and Unaccounted for Net Generation was 1 098.0 GWh, representing 26.7 per cent with Company Use accounting for the remaining 0.3 per cent.

All categories of customers, with the exception of Street Lighting, recorded declines. 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 impact of increased conservation practices as well as customers' switching to alternative energy sources. The General Service category was the largest contributor to this decrease, recording a 1.5 per cent decline to 569.7 GWh, followed by Large Power (down 1.2 per cent to 591.8 GWh)

and Other (down 20.6 per cent to 23.5 GWh). Residential (down 0.5 per cent to 981.5 GWh) and Small Power (down 0.2 per cent to 760.7 GWh) were the other categories which recorded declines in sales (Table 15.9).

JPS' electricity usage fell by 8.7 per cent to 11.6 GWh, while Line Losses (technical and non-technical) decreased by 0.5 per cent to 1 098.0 GWh. However, as a percentage of net generation, losses increased to 26.65 per cent from 26.64 per cent, despite the investment of approximately US\$15 million in loss related initiatives in 2014.

During the year, the JPS continued its loss reduction activities, focusing on Technical and Non-Technical Losses separately. Measures implemented to address technical losses included:

- Feeder Phase Balancing – this was essential in maintaining good voltage quality and reliability of supply by ensuring the neutral current for the three phase system to be less than 10.0 per cent of the feeder average current. Phase imbalance above 20.0 per cent translates into energy loss due to increased line current and voltage drop. At the end of 2014 only five feeders had phase imbalance above 20.0 per cent, therefore over 95.0 per cent of feeders were corrected and maintained within acceptable levels
- Power Factor Correction – a power factor of 0.95 is the optimal point at which efficiency is maximized on JPS lines. Eighty-one per cent of all JPS feeders were

brought and maintained within the established power factor in 2014.

Measures implemented to address non-technical losses included:

- Social intervention – JPS embarked on a pilot community renewable programme, which will include the regularization of customers, the distribution of energy efficient lights, direct subsidy (PATH), skills training and customer education
- Residential Automated Metering Infrastructure (RAMI) – JPS shifted focus from “Red Zone Communities” to “Yellow Zone Communities” which are communities with majority of residents employed with steady income streams. Automated Metering Infrastructures (AMIs) were installed in these communities. Total customers transferred to the AMI infrastructure was 6 109. An average of 35.0 per cent (7.3MWh) losses were measured from a sample 1 000 locations. Post installation reduced the level of electricity losses to approximately 3.0 per cent.

- Commercial Anti-theft Automated Metering Infrastructure (CAAMI) – a total of 1 532 commercial customers were connected to the AMI infrastructure
- Strike Force Operations – teams comprising of linesmen, technicians and police worked together through raids to identify and arrest guilty parties in all areas. The areas targeted were communities served by the highest loss feeders in the island. Over 1 000 persons were arrested and approximately 180 000 illegal connections removed.

JPS’ revenue increased by 2.2 per cent to \$112.5 billion (see Table 15.9). This marked the 5th consecutive year of increase and was influenced mainly by growth in revenue to the Residential category and Small Power categories, which recorded increases of 7.1 per cent to \$40.3 billion and 1.3 per cent to \$25.9 billion, respectively. The Street Lighting category remained flat at \$2.8 billion. These outweighed lower revenue in all other customer categories. The revenue out-turn for the year was supported by increases in the rates charged and an expansion in the number of customers.

TABLE 15.10
JPSCo- AVERAGE NO: CUSTOMERS, KWH USED, RATES CHARGED 2010–2014

	UNITS	2010 ^f	2011 ^f	2012 ^f	2013 ^f	2014 ^p	% Change	
							2013/2012	2014/2013
RESIDENTIAL - Rate 10								
Customers		518 141	510 056	523 725	536 168.0	537 900	2.4	0.3
Kwh used	000/KWH	2 136.4	2 061.0	1 957.3	1 839.3	1 824.7	-6.0	-0.8
Rate charged	Cents/kWh	2 713.2	3 326	3 488.2	3 810.5	4 102.2	9.2	7.7
GENERAL SERVICE - Rate 20								
Customers		60 190	59 172	61 097	62 014.0	61 632	1.5	-0.6
Kwh used	000/KWH	11 041.5	10 729.7	9 687.3	9 327.3	9 243.8	-3.7	-0.9
Rate charged	Cents/kWh	2 782.9	3 501.2	3 643	4 037.0	4 054.2	10.8	0.4
POWER SERVICE - Rate 40								
Customers		1 620	1 669	1 710	1 720.0	1 742	0.6	1.3
Kwh used	000/KWH	463 237.7	462 107.5	447 498.6	442 927.2	436 794.1	-1.0	-1.4
Rate charged	Cents/kWh	2 341.6	2 885.9	3 055.3	3 360.1	3 409.7	10.0	1.5
LARGE POWER - Rate 50								
Customers		139	146	150	150	150	0.0	0.0
Kwh used	000/KWH	4 335 319.0	4 166 536.3	4 072 906.2	3 994 622.4	3 945 489.2	-1.9	-1.2
Rate charged	Cents/kWh	2 148.6	2 669.7	2 814.4	3 100.4	3 100.8	10.2	0.0
OTHER GENERATING COMPANIES								
Customers		2	2	2	2	2	0.0	0.0
Kwh used	000/KWH	15 620 881.0	13 387 168.5	14 466 065.0	14 799 442.6	11 771 278.3	2.3	-20.5
Rate charged	Cents/kWh	1 761.1	2 493.8	2 435.7	2 671.6	2 749.5	9.7	2.9
STREET LIGHTING - Rate 60								
Customers		220	221	254	253	308	-0.4	21.7
Kwh used	000/KWH	322 981.2	321 844.9	276 280.6	278 534.0	229 258.0	0.8	-17.7
Rate charged	Cents/kWh	3 063.7	3 577.5	3 737.2	4 024.7	4 017.5	7.7	-0.2
Total # of Customers		580 311	571 266	586 937	600 306.0	601 733	2.3	0.2

Customers are represented as a 12 month average
p - preliminary

Source: JPSCo.

Average Consumption and Average Charges

JPS' customer base increased for the 3rd consecutive year, up by 0.2 per cent to 601 733 (Table 15.10). The highest absolute increase was recorded by the Residential category which rose by 0.3 per cent to 537 900 customers. The other categories which recorded increases in their customer base were Street Lighting, up 21.7 per cent to 308 customers and Power Service at 1 742 up from 1 720. The higher customer base continued to be impacted by the opening up of new housing developments and the ongoing implementation of the RAMI Project coupled with the regularization of customers resulting from the re-engagement initiatives employed.

There was a decline in average consumption by all consumer categories, due to reduced demand, reflecting increased conservation practices and a shift to alternative energy sources. The average rates charged to most consumer categories increased, with the Residential category reporting the largest increase of 7.7 per cent (see Table 15.10). Increases in the average rates recorded in 2014 were linked to the relatively higher adjustment on the fuel portion of the electricity bill, due to the uptick in international crude oil prices, especially during the first six months of year.

WATER

Policies and Programmes

Work continued in 2014 on the updating of the 2004 Jamaica Water Sector Policy (WSP) and development of a Rural Water Supply Development Strategy (RWSDS). These, when promulgated, are intended to address identified gaps and align with achieving the goals of *Vision 2030 Jamaica – National Development Plan*, 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”. The work associated with the draft of the WSP (draft) and the RWSDS, which is part of a three-fold initiative under the Kingston Metropolitan Area (KMA) Water Supply Improvement Project, was supported by grant funding from the IDB under the KMA Project⁸. To inform the revised policy, one Special Interest Group and four regional consultations were conducted, under the guidance of the WSP Project Steering Committee. The revision is in the final stages. Drafting of the RWSDS was carried out in 2014 and consultations undertaken at the individual parish level, subsequently.

The NWC commenced, continued as well as completed several projects under its capital programme. The major projects included:

TABLE 15.11
WATER PROJECTS, 2014

PROJECTS	OBJECTIVES/DESCRIPTION	STATUS	EXPENDITURE TO DECEMBER 2014
RWSL islandwide Catchment Tank Rehabilitation and Rainwater Harvesting Programme	Repairs catchment tanks including structural repairs to barbeques/ catchment areas, waterproofing, fencing, pipelines and standpipes as well as rainwater harvesting for schools/ institutions and residential units. Major components include guttering, pipelines and storage	Completed	Approximately \$45.0 million
Haining Water Supply, Portland	To install and transmission and distribution pipelines in order to improve water sourcing	Completed	Approximately \$16.0 million
Gutters/ Retirement, St. James	Involves chlorination, upgrading of facilities including pumps, storage tanks and pipeline installation	Substantially Complete	Approximately \$15.0 million
Old Harbour Water Supply, St. Catherine	To install 2.7km of 200mm pipeline from Rhodon's Well to Old Harbour for the purpose of increasing potable water supply to approximately 23 000 persons	Completed	Approximately \$50.4 million
Kingston Water & Sanitation Project, Darling Street	To construct a new wastewater pump station on an existing site with the aim of improving public health conditions	Completed	Approximately \$1.6 billion

Source: Compile from information provided by the Ministry of Water, Land, Environment & Climate Change, NWC and Rural Water Supply Limited

8. See ESSJ 2013.

- Kingston Water and Sanitation (KWS)
- The Jamaica Water Supply Improvement Project (JWSIP) – Category ‘B’ Works
- Kingston Metropolitan Area (KMA) W/S Lot 2B
- Port Antonio Water, Sewerage and Drainage Project – Stage 1

Among the water projects completed by the NWC were Hounslow Water Supply (WS) and upgrade and Hounslow to Parottee WS in St. Elizabeth; refurbishment of Bogue Water Treatment Plant, St. Ann; Clark’s Town WS, Trelawny; Old Harbour WS, St. Catherine; and upgrading of Linstead/Ewarton/Mt. Rosser WS, St. Catherine (Table 15.11).

The Rural Water Supply Limited (RWSL) completed several projects. These dovetailed with its expanded role in the provision of technical advice and support for the implementation of the RWSDS in areas which are deemed non-utility areas⁹. The RWSL facilitated work associated with these main strategic programmes:

- **Comprehensive Rural Water Upgrading and Repairs** – the island-wide implementation of water supply and pipeline upgrade projects to impact a population of approximately 20 000 persons by the end of the 2014/ 2015 fiscal year. Water Supply Projects completed included Windsor Heights Water Supply, St. Catherine; Haining, Portland; and Hagley Gap and Kenrick Hill, St. Thomas. Civil works are in progress for Gutters Retirement and Horse Guard Garlands in St James, while contracts were awarded for Seaton in St. Mary and the Pear Tree River/Richmond Hill Pipeline upgrade in St. Thomas. A total of \$24.76 million was expended on the project.

- **Rain Water Harvesting and Catchment Tank Rehabilitation** – to increase access to potable water for Jamaicans while taking into account the impact of climate change. These projects are being undertaken islandwide to benefit a population of approximately 12 000 persons by end of FY 2014/2015. Total expenditure to December 2014, was \$25.7 million, with several projects being implemented in the following areas: Chantilly/Bakers/French/Bottom Elliston, Manchester; Ashley/Cumberland, Clarendon; and Bird Mountain/Charles Mountain/Kilmarnock, Westmoreland.

Tank and Pump – the RSWL provided project management and engineering services. The objective of the programme is to enhance the reliability and efficiency of the NWC’s system, and involved the procurement of pumps, motors and tanks for rehabilitation of replacement.

PERFORMANCE

Water Production

Water production by the NWC declined by 0.6 per cent to 296 139.5 megalitres relative to 2013, due primarily to severe drought conditions experienced across the island during June and July 2014. This downturn reflected a 7.5 per cent fall to 73 855.5 megalitres in production in Kingston, St. Andrew & St. Thomas, which outweighed a 1.9 per cent rise to 222 284.0 megalitres in production in the category Other Parishes (Table 15.12).

Within the category Other Parishes, Clarendon, Trelawny and St. Elizabeth were the parishes that contributed to the downturn. Drought conditions in the April–June and July–September 2014 quarters influenced the year’s water production out-turn. The decreased production outweighed

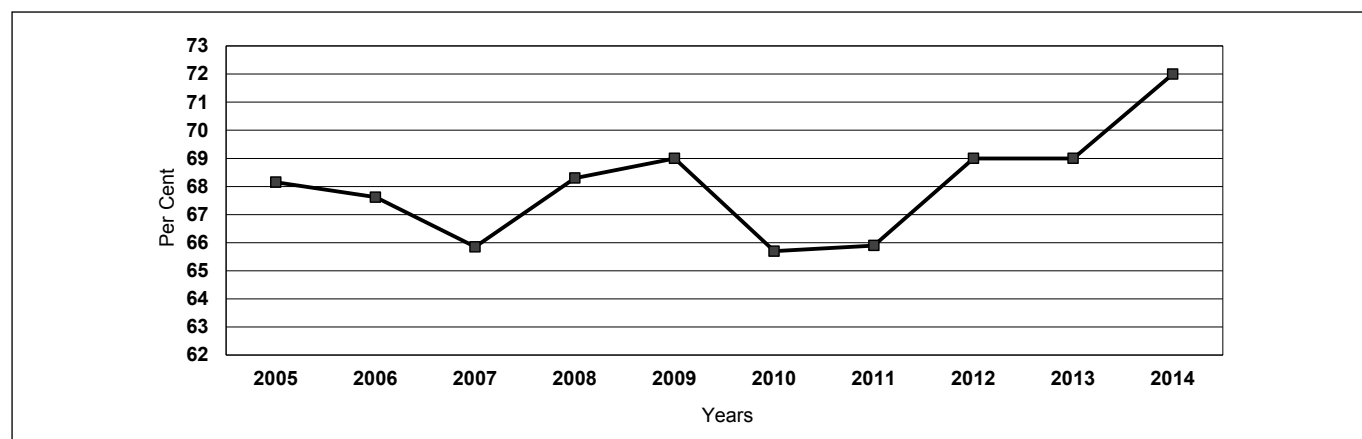


FIGURE 15C: NON-REVENUE WATER AS A PER CENT OF TOTAL PRODUCTION, 2005–2014

9. These are areas of the country where piped water is not economical, and a variety of alternative techniques are needed to provide access to a safe and convenient water supply.

TABLE 15.12
DATA ON DOMESTIC WATER, 2010–2014

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^p	% Change	
						2013/2012	2014/2013
Amount of Water Produced (Megalitres)	285 093.1	303 050.6	302 423.8	298 029.2	296 139.5	-1.5	-0.6
Kingston/St Andrew/St. Thomas	75 301.4	82 194.2	81 817.2	79 801.5	73 855.5	-2.5	-7.5
Other Parishes	209 791.7	220 856.5	220 606.5	218 227.7	222 284.0	-1.1	1.9
CONSUMPTION (Megalitres)	97 882.8	103 264.1	94 413.7	92 286.2	82 829.2	-2.3	-10.2
Kingston/St. Andrew/St. Thomas	33 037.2	36 620.1	37 256.5	33 790.2	29 334.6	-9.3	-13.2
Other Parishes	64 845.6	66 644.0	57 157.1	58 496.0	53 494.5	2.3	-8.6
NO. OF CONNECTIONS	435 874	447 261	454 035	459 563	466 695	1.2	1.6
Kingston/St. Andrew/St. Thomas	120 956	125 106	124 828	125 087	126 956	0.2	1.5
Other Parishes	314 918	322 155	329 207	334 476	339 739	1.6	1.6
Revenue (\$M)	15 360.5	17 529.8	21 981.1	22 326.5	26 272.9	1.6	17.7
Kingston/St. Andrew/St. Thomas	6 404.7	8 249.9	11 026.1	9 162.1	10 535.4	-16.9	15
Other Parishes	8 955.7	9 279.7	10 955.1	13 164.4	15 737.6	20.2	19.5

p - preliminary
r - revised

Source: National Water Commission

higher output recorded in the other parishes, led by St. Mary, Manchester and St. James.

Water consumption fell by 10.2 per cent to 82 829.2 megalitres compared with 2013, reflecting declines in Kingston, St. Andrew & St. Thomas and Other Parishes of 13.2 per cent and 8.6 per cent, respectively (see Table 15.12). The downturn in consumption was associated with the aforementioned drought conditions.

Approximately 72.0 per cent of water produced was non-revenue water (NRW)¹⁰ compared with 69.0 per cent in 2013 and 68.8 per cent in 2012 (Figure 15C). With respect to Kingston, St. Andrew & St. Thomas, approximately 60.3 per cent of the water produced was NRW compared with 57.7 per cent in 2013. For the category, Other Parishes, 75.9 per cent of water produced was NRW compared with 73.2 per cent in 2013. In recognition of the general increasing trend of NRW, the NWC continued to implement projects aimed at reducing NRW. These included the KMA Water Supply Improvement Programme, JWSIP Category 'B', JWSIP Category A1; coordination 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 intervention—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 connections to the NWC system increased by 1.6 per cent to 466 695, reflecting a higher number of connections in Kingston, St. Andrew & St. Thomas (up 1.5 per cent to 126 956) and Other Parishes (up 1.6 per cent to 339 739) {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.

NWC revenue was \$26 272.9 million relative to the \$22 326.5 million recorded in 2013. This reflected increased revenue for KSA & St. Thomas and Other Parishes of 15.0 per cent to \$10 535.4 million and 19.5 per cent to \$15 737.6 million, respectively (see Table 15.12). The full effect of the 2013 tariff adjustments, among other things, translated to the higher revenues for the year.

UTILITY REGULATION

The Office of Utilities Regulation (OUR) undertook several regulatory activities related to utilities in 2014, as stipulated by its mandate. Some of the ongoing matters attended to in the Electricity sub-industry were related to:

- on-going monitoring of the Standard Offer Contract (SOC) for Net Billing
- efforts directed at concluding service level agreements for electricity customers
- assistance to ESET to conduct assessment of generation and development of an integrated plan for the sector
- providing comments and advice on policy and regulatory issues (electricity policy, natural gas policy and regulation, electricity bill)
- review of JPS' 2014 tariff application.

10. 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.

With regards to the Water sub-industry, activities focused on:

- the K-Factor Fund which was set up to allow the NWC to collect a small percentage of the bill from the customers to go directly to infrastructure improvement, for example, the replacement of leaking pipes which should realize an improvement in non-revenue water losses. As at October 31, 2014, approximately 100 projects were approved by the OUR for funding under the K-factor programme at an estimated cost of \$31.0 billion. Sixty-seven projects with an estimated cost of \$24.0 billion were targeted at non-revenue water reduction and water supply improvement, while 33 projects at an estimated cost of \$7.0 billion were budgeted for sewerage and wastewater treatment.
- Accounting separation – in an effort to disaggregate costs for the various aspects of the NWC’s operations, the OUR directed the company to separate its accounts by cost centres. The OUR, consistent with its responsibility to develop applicable rules to guide the accounting separation process, in consultation with the NWC, determined the set of rules to guide the separation of the cost of the various services. This was done, to some degree, as a part of the NWC’s 2013–2018 tariff submission. However, further refinement of the process is still required.

OTHER DEVELOPMENTS

Oil and Gas Exploration

Activities regarding oil and gas exploration continued in 2014. The Government issued an exploration licence to British petroleum firm, Tullow Oil Plc. The company committed US\$60.0 million to undertake activities off the island’s South coast. The exercise is being facilitated under a Production Sharing Agreement (PSA) signed by the Petroleum Corporation of Jamaica (PCJ), and Tullow Jamaica Limited. Jamaica is also expected to benefit from the transfer of technology and training by virtue of Tullow Oil’s investment in relation to exploratory data collection. Exploration activities will target the Walton and Morant Basin regions, which cover an area of just over 32 000 square kilometres, and will, initially, entail extensive technical surveys and data gathering. This is aimed at determining whether there are adequate deposits of oil and gas to facilitate commercial production, which would enable drilling and extraction activities to be conducted. Under the PSA, the Government will secure between 45.0 per cent and 48.0 per cent of production, totalling over 50 000 barrels. The PCJ will oversee the arrangement, on behalf of the Government, in ensuring that the provisions are fulfilled.

Solar Hydrogen Gas for Domestic Cooking Project

The University of Technology (Utech) and partners (MSTEM, Brunel University, Bureau of Standards Jamaica, and University of the West Indies) began researching the prospect of developing hydrogen gas from solar powered electrolysis for household cooking. The project was conceptualized in late

2012 as a research project funded by the European Union. The successful completion would result in the displacement of some amounts of fossil fuel based cooking gas (LPG) in the future. The project, valued approximately 495 300 euros, is expected to be completed in 2015. During 2014 several achievements were realized; including:

- the procurement of equipment (retrofitting and testing equipment)
- the continuation of research on various methodologies to successfully complete the tasks over the three years (for example, the retrofitting of a gas stove to accept hydrogen fuel, colouring the hydrogen gas and storage of the fuel)
- conducting of pilot project study on the use of hydrogen gas as cooking fuel. Several households in a controlled environment were chosen for this exercise
- continued examination of standards to ensure compliance which will result in the administration or initiation, where necessary, to ensure the proper and safe production, storage, distribution and use of hydrogen.

100kW Solar Energy Project

On July 10, 2014, UTech and JPS formally commissioned a 100kW Solar Energy Project at the University’s Papine campus. The project was completed within budget at a cost of US\$308 000 and the photovoltaic system is expected to generate approximately 15 800 kWh of energy annually, representing an average usage of 93 households. A savings of US\$224 000 per annum is anticipated.

OUTLOOK

The Electricity & Water Supply industry is expected to grow in 2015, due to anticipated increases in electricity consumption and water production. For the electricity component, increased consumption should be pushed by higher demand from the Productive and Services industries. Anticipated increases in use of alternative energy and net billing customers should result in an uptick in supply. The Water Supply sub-industry is expected to benefit from the commissioning of several new water projects during the year. Also, against the background of severe drought conditions which affected the island in 2014, water production is anticipated to return to normal levels.

The anticipated higher value added may, however, be stymied by the impact of GCT on electricity bills, as the government disclosed plans for the re-introduction of the GCT at the standard rate on monthly residential electricity consumption above 350 kWh as of April 1, 2015. This may result in further increased conservation measures by customers which would result in reduced demand and lower electricity consumption. ■



TRANSPORT, STORAGE & COMMUNICATION

INTRODUCTION

The Transport, Storage & Communication industry recorded growth of 1.1 per cent during 2014. The improvement in real value added was attributed to the expansion in both the Transport & Storage and Communications segments of the industry. With regard to the former, the higher value added stemmed from increased air passenger movement and an expansion in the volume of cargo handled at the ports. Within the Communication segment, the improved performance was as a result of growth in telecommunications activities, as the sub-industry continued to benefit from the reduction in call rates and increased competition among the major service providers.

For the Transport & Storage segment, the indicators showed increases of 2.3 per cent to 15 424 thousand tonnes in the volume of cargo handled and 4.6 per cent to 5 087 171 in passenger traffic at the island’s airports. With respect to Communication, data for telecommunications showed total telephone subscribers at 3 134 184 at the end of September 2014 relative to 3 096 536 at the end of December 2013.

This was supported by increases in both fixed lines and mobile line subscribers. At the end of September 2014, mobile penetration rate of 105.8 per cent and teledensity¹ of 115.1/100 population was recorded relative to 105.0 per cent and 113.9/100 population at the end of December 2013, respectively.

TRANSPORTATION

Consistent with the goals of *Vision 2030 – National Development Plan*, which is aligned with the articulated aims and objectives of the National Transport Policy (NTP), the Ministry of Transport, Work & Housing (MTW&H) continued to pursue its mandate during 2014. Although the Policy is currently being reviewed, policies and programmes pursued during the year were undertaken in accordance with its goals, guided by the four main strategic priorities, as outlined in *Vision 2030 Jamaica – National Development Plan*:

- the expansion and rationalization of land transport infrastructure and services

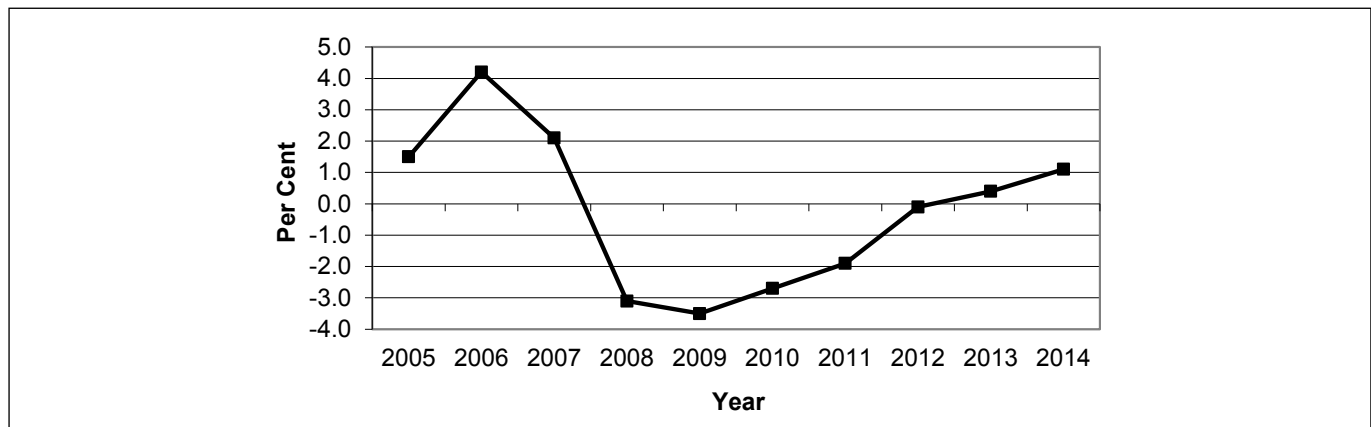


FIGURE 16A: REAL VALUE ADDED GROWTH RATES FOR THE TRANSPORT, STORAGE & COMMUNICATION INDUSTRY, 2005–2014.

1. Teledensity refers to the total number of telephone lines (mobile and fixed) per 100 population.

- the expansion and diversification of maritime infrastructure and services
- the expansion of domestic and international air transport infrastructure and services
- the development of a modernized public transport system.

Policies and Programmes

The *National Transport Policy*² (*NTP*) developed in 2007 to guide the overall development of the transport sector, was being reviewed in 2014. This was to ensure its facilitation of current trends and strategies in the transport industry. The review formed part of a three-fold process with works being undertaken on the associated *National Transport Strategy* and the *National Transport Plan*. The National Transport Plan study was designed to address the information gaps on the transportation system in Jamaica.

A proposal for the evaluation of the *National Road Safety Policy* was also effected during the year. The Evaluation Team met in November 2014, and preparatory activities got underway in December 2014. Other policy-related activities included:

- revision of the *Road Traffic Act*. The Road Traffic Act and Regulations (1939) are being repealed and replaced with a new Act that is in keeping with international best practices for road safety. The Joint Select Committee of Parliament reviewed the Road Traffic Bill and it was tabled in Parliament on June 4, 2014. On June 18, 2014, the matter was referred to the Joint Select Committee. The review of the Bill commenced September 9, 2014. The process is now far advanced and promulgation of the Act is expected in 2015.
- development of the *Land Transport Authority (LTA)*, which is envisaged to be a single entity charged with the responsibility for policy implementation in support of an effective and efficient management of the Land Transport sector. Under the initiative, it is proposed that the regulatory functions of the Transport Authority (TA), the Island Traffic Authority and the Jamaica Railway Corporation be merged to form the LTA. At the end of December 2014, work continued on finalizing the Draft and Final Comprehensive Reports
- formulation of a *Public Rights of Way (ROW) Access Management and Enforcement Policy*. The ROW 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. Preparatory work was completed in 2014 and plans were underway to secure a Consultant to fast-track this process. The Policy will satisfy the existing need for the creation and expansion of the legislative and management mechanism to allow for better coordination, protection of rights, and effective use, and cost management in the establishment, use and access to public rights-of-way.

Following the completion of school transportation standards and the roll-out of the St. Catherine School Bus Association in 2013, the Transport Authority (TA) started the implementation of an island-wide *School Bus Transportation System* in 2014. The TA collaborated with the Clarendon Parish Council and expanded its Safe School Bus Programme to Clarendon. In September 2014 for Foga Road, Glenmuir, and Denbigh High Schools. Consequent on the successful implementation, a decision was taken to extend the project to four high schools in Southern Clarendon—Bustamante, Vere Technical, Kemps Hill and Garvey Maceo High Schools. The Green Park Primary & Junior High School in Old Harbour was also included in the project. Over 3 500 students in Clarendon now benefit from the programme.

Infrastructure Development

Approximately \$2.8 billion was expended by the National Works Agency (NWA) on infrastructure works compared with \$7.6 billion in 2013. The reduction in spending was attributed to a decrease in outflows due to the closing out of the Jamaica Development Infrastructure Programme (JDIP). In addition to JDIP, disbursements for the year facilitated infrastructure works on the Palisadoes Shoreline & Rehabilitation Works; Transportation Infrastructure Rehabilitation Programme (TIRP); the Major Infrastructure Development Programme (MIDP); Road Improvement Programme (RIP), and Road Rehabilitation Project II. Expenditure by National Road Operating & Construction Company (NROCC) amounted to \$26.3 million³. This supported work mainly on the North-South Link of Highway 2000, which is being constructed in three phases—Section 1: Caymanas to Linstead; Section 2: Linstead to Moneague; and Section 3: Moneague to Ocho Rios.

The Major Infrastructure Development Programme (MIDP) – this programme constitutes a three-year US\$300.0 million project, financed through the China Export-Import (EXIM) Bank complemented by counterpart funds of US\$52.0 million. Preparatory works related to rehabilitation of roads and bridges were underway. The Jamaica Emergency Employment Programme (JEEP) component of the Programme, launched in March 2014, included the allocation of \$10.0 million to each of the 63 constituencies. For the year, approximately \$724.9 million was spent under this component of the project to undertake road maintenance

2. See ESSJ 2013.

3. This does not include the expenditure by the developer on the construction works.

and rehabilitation works, including sidewalk maintenance, drainage improvement and debushing.

The Jamaica Development Infrastructure Programme (JDIP) – as at December 2014, the programme, which officially closed on October 31, 2013, was 99.0 per cent complete. Final close-out activities were ongoing. During the year, JDIP was re-scoped to ensure all financial obligations under the project were payable, as well as provided funding for JEEP. Work undertaken under JDIP, over the project life, comprised road rehabilitation, periodic maintenance, river training, traffic management and retaining wall and bridge construction. JDIP, a five-year US\$400.0 million programme funded by the China EX-IM Bank and the Government of Jamaica (GOJ) commenced in 2010, and was established to upgrade and enhance the land-based transport infrastructure (road network).

The North-South Link of Highway 2000 – the construction of the North-South Link is being facilitated through a public-private partnership (PPP) with China Harbour Engineering Company Limited (CHEC), with investment of US\$600.0 million. This was in addition to a capital injection of US\$120.0 million as reimbursement to the government for works already undertaken on *Section 2—the Linstead to Moneague leg (Mt. Rosser Bypass)*. This section was completed and opened on August 5, 2014 and the collection of toll commenced on September 6, 2014. Work on the remaining legs is on-going and is slated to be completed in January 2016.

- *Section 1: Caymanas to Linstead* (27.5 kilometre (km) – At the end of December 2014, works on this section, which commenced in September 2013, was approximately 48.0 per cent completed. It is scheduled for completion in January 2016. At the end of December, ongoing activities at varying stages of completion included:
 - Site Clearance – 81.4 per cent
 - Earthworks (Cut and Fill) – 61.0 per cent
 - Slope Protection and Drainage – 17.0 per cent
 - Construction of Bridges – 52.0 per cent
 - Box Culverts – 80.0 per cent.
- *Section 3: Moneague to Ocho Rios* (19.5 km.) – works on this leg were also approximately 48.0 per cent completed. The developer commenced work on this section in October 2013. The completion date is slated for January 2016. Activities being undertaken during 2014 and which are at varying stages of completion included:
 - Site Clearance – 99.0 per cent
 - Earthworks (Cut and Fill) – 73.0 per cent

- Slope Protection and Drainage – 40.0 per cent
- Construction of Bridges – 35.0 per cent
- Box Culverts – 71.0 per cent.

1. LAND TRANSPORT

Traffic Management/ Road Safety

The strategies employed in the sector to address road transport management comprised: congestion management; administrative measures; and public transport-oriented measures.

- In the area of congestion management, there was the continuation of i) Preferential Treatment—specifically the use of bus lanes on selected corridors and the temporary Jamaica Urban Transit Company (JUTC) lane assignments on Mandela Highway between Spanish Town and Six Miles; and ii) 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 were carried out in conjunction with the local authorities and the police and included the establishment of car restricted zones, designated parking and no parking areas
- Public transport-oriented strategies entailed enhanced service quality—reasonable cost, clean and comfortable environment, regular, reliable and predictable service, as well as the institution of parking control for on-street space and publicly operated car parks.

Accordingly, traffic management strategies employed continued, and included:

- speed limits along road corridors
- restriction of turning movement—left or right turn only
- one way streets and street closures
- accident remedial measures—black spot treatment, skid resistant surfacing
- pedestrian crossing facilities
- priority bus lanes and bus stops
- information provision—public education campaigns, road signage (directional, regulatory, warning) and road markings.

PERFORMANCE

A total of 395 867 vehicles were examined island-wide by the Island Traffic Authority for fitness and certificates⁴ issued to 341 233. This compared with 390 369 vehicles examined and 310 297 certified fit to operate on the island's roads during 2013.

Weight Limit Enforcement Programme (WLEP)

The weighing of vehicles continued under the WLEP at the permanent weigh station at Harbour View and the two mobile scales in operation on the South and North Coasts⁵. A total of 5 938 vehicles were weighed (2 964 at Harbour View and 2 974 at the Mobile Stations). Of the total weighed, 1 047 were overweight and tickets were issued to 200 for the violation.

Passenger Movement & Transit

A total of 16 453 vehicles, providing 92 632 seats, were licensed to operate public transport services, 13.5 per cent lower than the number licensed in 2013. Rural Route Taxis accounted for 40.9 per cent of total seats; Rural Stage Carriages, 49.2 per cent; and vehicles licensed to operate in the Kingston Metropolitan Transport region (KMTR), 9.4 per cent; and Express Carriages 0.5 cent. In addition, the Montego Bay Metro Limited with 17 units supplied 831 seats. The estimated seating deficit islandwide was 2 876 compared with 7 646 in 2013.

The Transport Authority in regulating the transportation sector implemented new standards geared towards the safety and security of passengers. During the year, the Authority entered into a partnership with HEART Trust/NTA to train employees in the sector. To date, over 14 000 drivers and conductors of public passenger vehicles were trained and certified and subsequently issued with badges. The issuance of badges indicated that participants met the fit and proper criteria and standards for the sector. The badges are to be displayed by the operators at all times.

The enforcement arm of the Transport Authority was strengthened during the year, with the deployment of 60 new Route Inspectors islandwide. This seeks to enhance and improve the effectiveness and coverage of the operation team, thereby resulting in increased levels of compliance in the public transportation sector.

In August 2014, the fares for JUTC buses and their Sub-Franchise buses increased by 20.0 per cent to \$120.00. The fare for children and persons with disabilities rose to \$30.00 from \$20.00, while the fare for senior citizens increased to \$40.00 from \$20.00. A 25.0 per cent fare increase, which impacted the JUTC, Route Taxis, Rural Stage carriage and Hackney Carriage was effected in August 2013.

4. Disaggregation of data according to vehicle types was not available.

5. The operations in Harbour View commenced in November 2012, while the mobile scale operations resumed in July 2013.

Public Buses

In the KMTR, the JUTC operated on 95 regular and express routes, 25 premium routes and three special service routes for the physically-challenged as well as charter services. These routes were serviced from three depots—Rockfort, Portmore and Spanish Town, and were facilitated by an average dispatch of 392 buses providing seating capacity of 21 000.

The JUTC operated an average of 392 buses per month in the KMTR relative to an average of 280 per month in 2013. The increased dispatch emanated from a higher number of bus run-out for all quarters of the year and reflected, among other things, the improvement in the availability of parts for maintenance. The higher number of buses dispatched, the increased bus fares along with activities undertaken by the Franchise Protection & Road Management Unit (including the rationalization of routes) resulted in growth in the associated indicators:

- Passenger Trips, up 13.0 per cent to 57 995 309
- Fare Income, up 39.5 per cent to \$4 249.5 million
- Revenue intake from Charters, up 17.5 per cent to \$140.0 million

The increased Fare Income reflected the combined impact of the 2013 fare increase and the additional increase in fares in August 2014. The incentivized promotion efforts at individual depots contributed to the growth in revenues from charter trips.

The number of Smarter Cards issued was 88 833 relative to 26 102 in 2013. The increased numbers were boosted mainly by the partial roll-out of the cashless system in the July–September 2014 quarter, which necessitated the use of the Smarter Cards as all concession passengers were required to use a card to pay their fares. The growth in the issuance of Smarter Cards and higher bus fares also impacted positively the revenue intake from these cards, resulting in more than a doubling to reach \$694.5 million. This out-turn represented 16.3 per cent of fare income, 7.0 percentage point higher than that of 2013.

The operators of JUTC sub-licenceses, Rural Stage Carriage with routes terminating in the KMTR, and Express Carriage continued to provide complementary service to the JUTC during 2014. The number of JUTC sub-licenceses decreased from 378 to 366 reflecting the JUTC's stated intention to sub-franchise operators in the KMTR.

Licences – Public Passenger Services

A total of 48 581 applications for licences were received by the island's Transport Authority, 8.8 per cent lower than

the number received in 2013. This reduction, which may be attributed to the cessation in the issuing of new licences, showed declines in applications for all the categories:

- Route Taxi, down 19.2 per cent to 13 596
- Hackney Carriage, down 8.4 per cent to 1 458
- Contract Carriage, down 2.3 per cent to 4 511
- Rural Stage Carriage, down 25.2 per cent to 702
- Commercial Carriage (public and private carriers), down 2.5 per cent to 28 781.

Reflecting the reduction in applications received, the number of licences issued declined by 17.4 per cent to 40 511. The contraction emanated from reduced issuances to all the categories, with the Route Taxi category reporting the highest fall-off of 25.1 per cent to 9 809 (Table 16.1).

2. MARITIME TRANSPORTATION

Plans to position Jamaica as a major player in the global supply chain industry were further advanced during the year. Within the maritime industry, activities undertaken continued to be linked to the commitment to establish a Logistics Hub in the island, the fourth node in the global logistics chain. This became necessary as the country position itself to:

- benefit from increased business prospects associated with the expansion of the Panama Canal, which is slated to be opened in the medium-term
- take advantage of the opportunities to be derived from the shifts that are taking place within global trade and shipping.

Related activities and discussions during the year continued to focus on 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. As such, work continued on several initiatives and projects, including:

- **Privatization of the Kingston Container Terminal (KCT)** – Efforts to secure privatization of the KCT continued during the year. At the end of 2013 the three pre-qualified entities—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—proceeded to the bidding stage of the procurement process. The bids were submitted on July 3, 2014 following an extension request from the original date of May 22, 2014. Bid opening and evaluation were completed on September 12, 2014. Negotiations with the provisional preferred bidder are ongoing. Activities related to the planned dredging of the Kingston access channel are currently part of the KCT bidding process. The results of the associated Dredging/Borehole Studies, which will determine the required scope of the dredging project and inform the technical and financial proposals for the bidders, were received in March 2014.
- **Development of a Port Community System (PCS)** – activities for 2014 included the establishment of an Independent Task Force to assess the impact of the Jamaica Customs Agency’s Automated System for Customs Data (ASYCUDA) World project on the Public Private Partnership (PPP) PCS project. This assessment report, which was received on September 14, 2014, concluded that a reduced scope PCS was required for the country’s logistics and trade environment. Subsequently, in October 2014, a team comprising representatives from the Port Authority of Jamaica (PAJ), Shipping Association of Jamaica and Jamaica Customs Agency, visited three countries and

TABLE 16.1
TAXI SERVICE: LICENCE ISSUED, 2010–2014

Licence Type	2010	2011	2012	2013	2014 ^P	% Change	
						2013/2012	2014/2013
Route Taxi	12 483	15 063	12 735	13 093	9 809	2.8	-25.1
Hackney Carriage	1 484	1 651	914	1 530	1 220	67.4	-20.3
Contract Carriage	4 075	3 735	2 959	3 315	3 230	12.0	-2.6
Rural Stage Carriage	966	1 114	839	1 085	1 029	29.3	-5.2
TOTAL	19 008	21 563	17 447	19 023	15 288	9.0	-19.6
Commercial Carriage	26 249	24 520	17 850	30 011	25 233	68.1	-16.0
GRAND TOTAL	45 257	46 083	35 297	49 034	40 511	39.0	-17.4

Note - Data on Commercial Carriage reported for the first time in 2014
p - preliminary

Source: Transport Authority

four ports⁶ to assess current PCS implementation and port activities that are at an advanced stage. A Request for proposal (RFP), based on the reduced scope PCS, is scheduled to be made available to three bidders through the limited tender process during Fiscal Year 2015/2016.

- ***Development of a Logistics/Transshipment Port in the Portland Bight Protected Area (PBPA)/ Goat Islands*** – during the year, discussions continued with CHEC regarding the development of a Logistics Port in the PBPA. In March 2014, an initial (non-binding) Framework Agreement, which provided the general terms and conditions under which further discussions would take place, was signed. A Final Framework Agreement was signed on August 5, 2014 and will expire no later than July 31, 2015, or upon the signing of the Concession Agreement. The Concession Agreement will be subject to:
 - successful completion of detailed technical and feasibility studies
 - submission to and approval by NEPA and all other relevant agencies of Government
 - the Parties agreeing and executing the Definitive Agreements.

In the interim, with respect to port development, CHEC commenced its coastal dynamics investigation. Regarding the landside development, CHEC has developed a concept layout identifying the proposed use and a tentative schedule depicting the phased development for the proposed three-phased project. The first phase is projected to be completed in the last quarter of 2016.

PERFORMANCE

Ship calls to the island's ports fell by 2.9 per cent to 3 470, reflecting a contraction at the Port of Kingston (down 7.6 per cent to 2 384) although ship visits to the Outports increased by 9.6 per cent to 1 086 (Table 16.2). The year's performance was fuelled by a reduction in the number of ship calls during the first half of the year, which outweighed the increase recorded during the last six months. The reduced ship calls at the Port of Kingston emanated from declines at Kingston Wharves and Kingston Sufferance Wharves/Private Wharves, due mainly to the cessation in calls by one shipping line at the former. Declines at these locations outweighed increased number of ship calls at the KCT, up 4.1 per cent to 1 506, which was supported by the commencing in service of a new shipping line. The performance at the Outports was facilitated by increases in the number of ship visits to Falmouth, up by 15 to 56; Ocho Rios, up by seven to 146; Port Rhoades and Montego Bay, both up four to 124 and 56,

respectively. The category Other also recorded higher ship calls, up by 36 to 192.

The volume of domestic cargo handled at All Ports rose to 15 424 thousand tonnes from 15 082 thousand tonnes in 2013 (see Table 16.2). This out-turn represented a rebound following two consecutive years of contraction, and was due mainly to an uptick in activities in the global economic environment. The higher volume was supported mainly by an increase of 13.3 per cent to 10 995 thousand tonnes recorded at the Port of Kingston. Cargo volume at the Outports grew by 0.1 per cent to 10 417 thousand tonnes.

The increased cargo volume at the Port of Kingston stemmed from an expansion in activities at the KCT to 1 085.0 thousand tonnes compared with 905.8 thousand tonnes and the Private Wharves, 3 318.0 thousand tonnes relative to 3 152.1 thousand tonnes in the previous year. The out-turn at the Private Wharves was supported mainly by the higher volume of dry bulk handled, the main contributors being the Cement Company, Jamaica Gypsum and the Jamaica Flour Mills. Transshipment cargo increased by 11.3 per cent to 8 173 thousand tonnes (see Table 16.2).

Performance at the Outports was influenced mainly by the higher volume of bauxite exported, which was in response to increased demand by the aluminium industry. The uptick in volume at the Outports was facilitated by increased cargo handled at Port Rhoades (up 2.5 per cent to 5 807 thousand tonnes), Rocky Point (up 2.3 per cent to 1 243 thousand tonnes) and Port Esquivel (up 10.5 per cent to 604 thousand tonnes).

The total volume of cargo handled at the island's ports (inclusive of petroleum products) expanded by 5.2 per cent to 23 597 thousand tonnes. This reflected increases in both the volume of domestic and trans-shipment cargo handled, up 2.3 per cent to 15 424 thousand tonnes and 11.3 per cent to 8 173 thousand tonnes, respectively. Reflecting reduced demand associated with the weak domestic economy, the volume of petroleum products handled fell 5.3 per cent to 2 186 thousand tonnes (see Table 16.2).

3. AIR TRANSPORTATION

During the year, strategies remained centred around the expansion of the domestic, international and air transport infrastructure and services. As part of the government's effort to facilitate the projected expansion of Jamaica's aviation industry, work continued on the construction of new air traffic control (ATC) towers at the Norman Manley International Airport (NMIA) and Sangster International Airport (SIA). In particular, this activity also served to mitigate potential visual impairment at the expanding airports. Building and external works on the new Air Traffic Control Towers at the NMIA and Site Acceptance Tests (SATs) for the equipment

6. The countries and ports visited were Spain (Barcelona – PORTIC and Valencia – Valencia Port PCS); France (Le Havre – SOGET PCS); and United Kingdom (Felixstowe – MCP PLC PCS).

TABLE 16.2
PORTS: SHIP TRAFFIC & CARGO FLOW, 2010–2014

	2010	2011	2012	2013	2014 ^p	% Change	
						2013/2012	2014/2013
KINGSTON							
No. of Vessel Visits	2 773	2 694	2 673	2 581	2 384	-3.4	-7.9
Volume of Cargo ('000 tonnes) ^a	15 057	16 864	10 957	9 704	10 995	-11.4	13.3
- Domestic ^a	3 331	3 471	2 452	2 361	2 822	-3.7	19.5
- Petroleum Product	2 380	2 172	2 367	2 309	2 186	-2.5	-5.3
- Transhipment	11 726	13 393	8 505	7 343	8 173	-13.7	11.3
OUTPORTS							
No. of Vessel Visits	862	927	993	991	1 086	-0.2	10.3
Volume of Cargo ('000 tonnes)	9 632	11 378	10 640	10 411	10 417	-2.2	0.1
- Landed	2 491	2 730	2 591	2 563	2 417	-1.1	-5.7
- Loaded	7 141	8 648	8 049	7 848	8 000	-2.5	1.9
TOTAL - ALL PORTS							
No. of Vessel Visits	3 635	3 621	3 666	3 572	3 470	-2.6	-2.9
Volume of Domestic Cargo ('000 tonnes)	15 343	17 021	15 459	15 082	15 424	-2.4	2.3
Volume of Total Cargo ('000 tonnes)	27 069	30 414	23 964	22 424	23 597	-6.4	5.2

a - excludes petroleum products

p - preliminary

Source: Port Authority of Jamaica

were completed in May 2014 and final completion and hand-over took place in July 2014. At the SIA, the construction of the tower was completed in June 2014 – Taking Over Certificate issued and taking over date was September, 2014. Implementation of the towers is scheduled for the First Quarter of 2015/2016. The project is being managed and executed by the Jamaica Civil Aviation Authority (JCAA).

At the NMIA, work continued under the US\$26.0 million Phase 1B of the three-phased Capital Development Programme (1A, 1B and 2)⁷. The projects are primarily aimed at reducing airport operational risks, gaining efficiency in the operations, reducing energy consumption, and expanding capacity. Several projects and activities, which continued in 2014 are at advanced and varying stages of completion, with completion scheduled for 2015/2016. These included:

- Chilled Water Distribution System –
- The procurement of:
 - a new Aircraft Rescue & Fire Fighting (ARFF) Vehicle.)
 - a Parking Access & Revenue Control System
 - Security Screening Machines
 - Voice over Internet Protocol (VoIP) Phone services

- Indoor Air Quality re-evaluation for the Administration Building
- Consultancy investigations toward the Implementation of an Interim Runway End Safety Area (RESA) and Airside Pavement Assessment.
- Stack Emission Monitoring for the Incinerator
- 4KV Electrical Substation Upgrade
- Fire Suppression System expansion to the Arrivals Concourse
- Sewage System Expansion, Phase 2.

Activities related to the privatization of the NMIA continued under the guidance of the Enterprise Team, the body appointed by the government to provide oversight for the privatization⁸. The Request for Qualification (RfQ) was issued during the week of November 30 – December 5, 2014 with a scheduled submission deadline for the first quarter of 2015. Also, a stakeholder assessment was conducted on behalf of the International Finance Corporation (IFC) during the period September 15–19, 2014. An aeronautical rate review was completed in August 2014 and published on November 21, 2014 and is scheduled for implementation in April 2015. As at December 2014, the PPP transaction was at the stage of identifying prequalified investors to bid for the opportunity to operate the facility, with commercial close anticipated by the 3rd Quarter 2015/2016.

7. Phase 1A was completed in March 2012, while timelines for commencement of Phase 2 was pushed back to 2016/2017.

8. The Development Bank of Jamaica (DBJ) serves as the Secretariat and the International Finance Corporation (IFC) was appointed general consultants.

Activities at the SIA continued to focus on achieving quality customer service. Consequently, work in 2014 facilitated the completion of the new Emergency Response Services Fire Hall. The improved amenities for the Emergency Response Team is situated at a location adjacent to the runway, thereby improving response times and assuring proper cover for the new fire trucks. The walk through duty free store, World Duty Free, was also completed in 2014.

PERFORMANCE

Despite the slow start to the year, the air transport industry experienced a turnaround resulting in growth by the end of 2014. At the beginning of the year, activities were curtailed by winter storms, which caused delays of several flights and/or cancellation of several in the Northeast and Central USA. This resulted in contraction in passenger number at the NMIA during the first quarter of 2014. However, the introduction of new air service initiatives, among other things, positively impacted the industry during the remainder of the year. In addition, the benefits gained from the reduction in international oil prices during the latter half of the year and the associated economic spin-off provided additional boost to the air transportation industry.

Total passenger movements⁹ at the island's international airports grew by 4.6 per cent to 5 087 171 passengers, reflecting respective increases of 5.0 per cent to 2 487 679 and 4.9 per cent to 2 524 820 in the heavier-weighted arriving and departing passenger categories (Table 16.3). The Intransit category declined by 2.9 per cent to 83 672 passengers. The higher passenger out-turn emanated from the growth in passenger movement recorded at all three international airports:

- SIA, up 8.7 per cent to 3 628 855 passengers

- NMIA, up 4.5 per cent to 1 456 244 passengers
- Ian Fleming International Airport, up 24.5 per cent to 2 072 passengers

The increased passenger traffic at the SIA was supported by the implementation of a number of air service initiatives by some airlines, some of which were effected during the 2013/2014 Winter Tourist Season. These translated into higher traffic volume in the two heavier-weighted categories—Arrivals, at 1 782 096 passengers compared with 1 704 495 during the previous year; and Departures, at 1 796 353 passengers compared with 1 711 537 passengers. There was a fall-off of 29.6 per cent to 50 406 passengers in the number of Intransit passengers. The aforementioned initiatives included:

- increased flight frequency by airlines such as Copa Airlines with five flights, up from four; Spirit Airlines with daily flights from Fort Lauderdale; Air Berlin offered fortnightly air/sea exchange from Munich and Dusseldorf, Germany; United Airlines out of Chicago, (up to two from one); Washington (up to three from one); ; Newark (up to nine from four); and Sunwing out of Canada with five weekly flight, (up from three)
- introduction of new flights such as Air Canada Rouge out of Canada; Candor Airlines from Munich, Germany; Frontier with charter service from Denver; Thomson Airways and Thomas Cook Scandinavia Airlines both offered service from Stockholm, Sweden; and Jet Blue Airway's launch of a new daily flight from Fort Lauderdale on May 2014 as well as the introduction of an additional one weekly flight for Boston from February to April 2014.

TABLE 16.3
INTERNATIONAL AIRPORTS: MOVEMENTS OF AIRCRAFT, PASSENGERS, CARGO AND MAIL, 2013 - 2014

	2013 ^r				2014 ^p				% Change	
	N.M.I.A	S.I.A	IFIA	TOTAL	N.M.I.A	S.I.A	IFIA	TOTAL	2013/2012	2014/2013
Arrivals	664 757	1 704 495	936	2 370 188	704 518	1 782 096	1 065	2 487 679	0.5	5.0
Departing	693 275	1 711 537	948	2 405 760	727 460	1 796 353	1 007	2 524 820	0.6	4.9
Intransit	14 570	71 596	0	86 166	33 266	50 406	0	83 672	-22.4	-2.9
Total Passengers	1 372 602	3 487 628	1 884	4 862 114	1 456 244	3 628 855	2 072	5 087 171	0	4.6
Aircraft Movement	20 355	39 489	2 628	62 472	21 223	40 676	2 670	64 569	-5.2	3.4
Cargo (Kilograms)	9 684 947	5 566 949	0	15 251 896	10 223 927	6 258 665	0	16 482 592	-0.4	8.1
Mail (Kilograms)	1 818 319	695	0	1 819 014	2 107 014	0	0	2 107 014	-23.2	15.8

r - revised

p - provisional

Source: Airports Authority of Jamaica

9. This represents data supplied by the Airports Authority and includes crew members, which is not included in stopover arrivals data published by the Jamaica Tourist Board.

An additional fillip to the industry was provided by the improvement in passenger load factor on some airlines, including Jet Blue, Thomson Airways, US Airways, Westjet and Sunwing. Jet Blue's new daily service from Fort Lauderdale, launched in May 2014, recorded average load factor of 90.0 per cent. In addition, Miami Air, through Sunwing's affiliate Vacation Express' charter programme, operated one weekly flight out of Miami, Nashville, Cincinnati and Newark with a load factor of 85.0 per cent.

The growth in passenger traffic at the SIA was achieved despite the reduction in flight activities brought about by: 1) the curtailment of operations by US Airways from its Charlotte and Philadelphia hubs, which began at the end of 2013 when the company announced its merger with American Airlines; and 2) American Airlines' reduction from two to one weekly non-stop service from Chicago O'Hare, as at April 2014.

The improvement in passenger traffic at the NMIA emanated from increases in all three categories—Arrivals (up 5.9 per cent to 704 233); Departures (up 4.9 per cent to 727 319); and Intransit (up 128.3 per cent to 33 266). Similar to the SIA, the out-turn at the NMIA was supported by a combination of factors, including the introduction of new and additional flights by some airlines and the cycling out of Caribbean Airlines' fall-out, which started in April 2013. With respect to the out-turn for Intransit passengers, the boost was linked to the increase in the number of persons who travelled with Cayman Airways and Caribbean Airlines enroute to SIA as well as Fly Jamaica with its triangular JFK–Kingston–Guyana and Guyana–Kingston–JFK routes.

The positive performance during the year outweighed negatives such as the reduction in operations by US Airways, American Airlines, Fly Jamaica and Spirit Airlines; and the unscheduled suspension of Transaero's year-round service from Russia.

With respect to the IFIA, passenger movement was disaggregated as follows. Arriving, at 1 065 compared with 936 passengers; and Departing, at 1 007 compared with 948 passengers. The IFIA continued to facilitate the general aviation industry/private aircraft operators and seeks to support growth in international traffic at a hassle free, closer airport connection into the prime tourism resort areas of St Ann, St Mary and Portland.

Aerodromes

The aerodromes continued to facilitate the movement of tourists, leisure and business passengers. There was a decline of 19.6 per cent to 8 806 in passenger traffic at the aerodromes, resulting from expansion/ contraction in flows through:

- Tinson Pen 2 812 relative to 3 701
- Negril 5 608 relative to 6 818
- Ken Jones 389 relative to 353.

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. The activity in the sub-industry is changing, given the increased emphasis on logistics, warehousing and storage. With regard to the ports, data for the volume of cargo handled was 15 424 thousand tonnes compared with 15 082 thousand tonnes in 2013 (see Table 16.2). The year's out-turn was supported mainly by increased activities at the Port of Kingston, up 13.3 per cent to 10 995 tonnes. Activities at the Outports remained relatively flat, reflecting the performance in export of alumina and sugar. With regard to warehousing, the amount of space leased by the Factories Corporation of Jamaica for storage declined from 32 082.3 square metres to 23 915.4 square metres. For 2014, the lease rates per year remained unchanged at between \$2 869.20 and \$3 463.20 per square metres.

COMMUNICATION

Policy Framework

Work on implementing the critical areas of the Information and Communication Technology (ICT) Policy continued in 2014 and involved the following activities:

- the procurement of consultancy services for the design and establishment of a converged stand-alone single ICT Regulator, with specific task to:
 - review the current administrative and regulatory framework and governance model for the ICT sector and provide specific recommendations for drafting appropriate strategic legislation for the establishment of a converged stand-alone ICT regulator
 - propose an organizational structure for its establishment and implementation.

Stakeholder consultations were completed and the consultants submitted their draft report for final comments.

- the advancement of work on the development of a Cyber Security Strategy. The Strategy, which ultimate goal is to engender confidence in the users of cyber space such that they can continue to achieve their full potential, seeks to:
 - address minimum standards for the protection of critical infrastructure and sensitive data
 - develop and sustain a pool of information security professionals in both the private and public sector
 - establish a sound legal framework that will create offences for which there will be legal recourse

- promote public education and awareness regarding cyber security

The Strategy was developed with the technical support of the Organization of American States (OAS) and inputs from a wide cross section of local stakeholders, including government, private sector and academia. In addition, several other organizations provided their input and guidance into the development of the strategy including, the Commonwealth Cybercrime Initiative, the Commonwealth Telecommunication Organization, and the Global Cyber Security Capacity Centre of University of Oxford.

- preparatory work for the implementation of number portability of fixed to fixed and mobile to mobile number portability with the gazetting of the Telecommunications (Number Portability) Rule 2014 during the last quarter of 2014. This paved the way for the formal establishment of the Number Portability Working Group and the commencement of the process towards the identification of parties interested in being licenced to be the Number Portability Administrator (NPA) service provider.

In addition, further work to strengthen the legislative and regulatory framework for ICT sector was undertaken in the following areas:

- Data Protection Act – work continued on the drafting of instructions for the Data Protection Bill for issuing to the Chief Parliamentary Counsel. The Act will seek to protect the privacy of individuals in relation to personal data and the regulation of the collection, processing, keeping, use and disclosure of certain information relating to individuals
- Cybercrimes Act – following the review by a Joint Select Committee of Parliament (JSCP) the Bill was drafted and submitted to the Legislation Committee of the Cabinet for review.

With regard to Number Portability, work was undertaken on the development of the supporting Number Portability Regulatory Framework, including terms and conditions for NPA Licence technical specifications as well as the Industry Number Portability Guidelines.

NEW INVESTMENTS IN INDUSTRY

New investments in the sector were realized due to a shift in the telecommunications landscape through the acquisition of FLOW by LIME and Telstar Cable Limited by Digicel as the company sought to expand into new areas. The provision of telecommunication services was reduced to two providers.

PERFORMANCE

During the year, six new licences were issued – four Service Provider and two Carrier licences¹⁰, (Table 16.4). Cumulatively, the number of licences issued since liberalization of the industry in 2000 totalled 484. A total of four licences were renewed relative to nine during 2013.

Compared with 3 096 536 at the end of December 2013, the number of telephone subscribers was 3 134 184 as at September 2014. This increase translated in teledensity of 115.1/100 at the end of September relative to 113.9/100 at the end of December 2013. There were also higher number of mobile users, up 1.2 per cent to 2 880 589 (Table 16.5). This resulted in a mobile penetration rate of 105.8 per cent, indicating that some subscribers have more than one account with one or more provider.

Growth of 1.3 per cent to 253 595 was recorded for fixed lines, a reversal in the declining trend observed over several years. The out-turn for 2014 may be explained by the new marketing strategy introduced, such as the bundling of services at standard rates, which resulted in the lowering of total bills. For fixed lines, the out-turn emanated from an increase in the number of Residential lines, which followed several years of decline. The number of Business lines fell from 75 478 to 73 943 (see Table 16.5).

TABLE 16.4
NUMBER OF TELECOM LICENCE GRANTED, 2010–2014

Licence Type	2010	2011	2012	2013 ^r	2014 ^p
Service Provider	9	2	1	6	4
Carrier	6	1	1	7	2
Total Issued	15	3	2	13	6

r - revised

p - preliminary

Source: Information & Telecommunication Technology Division, MSTEM

10. 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.

Community Access Points (CAPs)

As at December 2014, some 205 Community Access Points (CAPs) were established under the Universal Service Fund. In addition, there was expansion in the island-wide broadband network to include health facilities as well as high schools, public libraries and selected post offices. As at the end of 2014, a total of 376 sites were commissioned into service—208 educational institutions, 41 libraries, 68 post offices, and 59 selected health facilities across the island.

Post and Telecommunications Department (PTD)

Approximately 45.9 million pieces of mail was handled by the Department compared with 54.8 million pieces in 2013. The reduction continued to reflect the shift from the traditional mail to electronic communication, consequent on developments in the ICT sector. This was evidenced by a contraction of 16.3 per cent to 45.7 million pieces in the heavily-weighted Letters category and 3.0 per cent to 97 000 pieces in the Parcels category. The category Others, which consists of Packets, Express and Zip Mail, increased by 10.2 per cent to 119 000 pieces. This may be attributed to corporate and individual clients opting for faster mode of delivery locally and internationally.

Reflecting, among other things, the reduced activity of the Department, revenue declined from \$1 583 million in 2013 to \$1 498 million. Expenditure fell by 9.4 per cent to \$1 906.0 million. This out-turn resulted in a deficit of \$408.0 million compared with \$335.0 million recorded in 2013 (see Table 16.6).

During the year, the Department collaborated with different agencies in a bid to expand their services as well as improve service delivery. The Department formed new business partnership with one bill payment agency to facilitate payments at major locations and signed agreement with a main courier service provider to offer the express delivery service (Fast Track) to persons locally, particularly in locations where the organization does not offer an Express Mail Service. With regard to service delivery, the Department partnered with the Universal Postal Union to facilitate the Global Monitoring System to test the delivery of letters. The Department also benefited from upgrades to its CCTV and intrusion detection system as well as partnership with private security companies, the Jamaica Constabulary Force and Jamaica Defense Force personnel during the year. The work of the Department was also supported through a joint agreement with HEART Trust/NTA to provide training to staff in various areas.

UTILITY REGULATION

The Office of Utilities Regulation (OUR), continued work consistent with the imperatives of the telecommunication sub-industry, which included the:

- deployment of broadband and promoting access for the benefit of all citizens, including those with disabilities
- strengthening of competition in the various markets
- facilitation of the use of an efficient numbering system
- development of efficient cross network connectivity

TABLE 16.5
TELEPHONE SUBSCRIBERS by CATEGORIES 2010–2014
NUMBER OF LINES

Categories	2010 ^r	2011 ^r	2012 ^r	2013 ^p	2014 ^p	2013/2012	2014/2013
Fixed Lines	284 285	270 068	253 143	250 340	253 595	-1.1	1.3
Residential	203 323	191 099	175 916	174 862	179 652	-0.6	2.7
Business	80 962	78 969	77 227	75 478	73 943	-2.3	-2.0
Mobile Lines	3 181 995	2 945 395	2 714 938	2 846 196	2 880 589	4.8	1.2
Pre-Paid	3 048 967	2 825 687	2 563 634	2 696 408	2 727 721	5.2	1.2
Post-Paid	133 028	119 708	151 304	149 788	152 868	-1.0	2.1
Total Telephone Subscribers	3 466 280	3 215 463	2 968 081	3 096 536	3 134 184	4.3	1.2
Teledensity	126.9	118.9	105.8	113.9	115.1	5.3	1.1
Internet	118 187	119 423	124 168	928 472	1 096 935	647.8	16.3
Narrowband	1 421	1 154	1 122	976	966	-13.0	-1.0
Broadband	116 766	118 269	123 046	140 816	151 554	14.4	7.6
Mobile Broadband	n/a	n/a	n/a	786 680	927 415	-	-17.9

Note - Data on Mobile Broadband was reported for the first time in 2013

Mobile figures for 2014 is as at September

n/a - not available

r - revised

p - preliminary

Source: Office of Utilities and regulation

TABLE 16.6
POST and TELECOMMUNICATIONS DEPARTMENT OPERATING AND FINANCIAL DATA 2010–2014

	2010	2011	2012	2013	2014 ^p	2013/2012	2014/2013
Volume of Mail handled ('000)	67 260	66 000	59 851	54 832	45 930	-8.4	-16.2
Letters (Including Registered)	67 060	65 958	59 655	54 624	45 714	-8.4	-16.3
Parcels	86	93	84	100	97	19.0	-3.0
Others	113	120	92	108	119	17.4	10.2
Finances (\$M)							
Revenues	1 357	1 565	1 322	1 583	1 498	19.7	-14.9
Expenditures	1 721	1 808	1 715	1 918	1 906	11.8	-9.4
Surplus (Deficits)	-364	-243	-393	-335	-408	-14.8	21.8

p - provisional

Source: Post and Telecommunications Department

- enhancement of competition by way of efficient pricing
- reduction in the time-loss and expenses of resolving disputes.

Consequently, the OUR collaborated with the relevant government and private stakeholders to continue work in areas such as pursuit of the implementation of **Number Portability**; commencing consultation on the development of a **Long Run Incremental Cost Model (LRIC)** for the Fixed Telephony in the wake of its successful implementation in mobile; and consulting on draft rules for Dispute Resolution and Quality of Service.

OTHER DEVELOPMENTS

Privatization of the Jamaica Railway Corporation (JRC)

Cabinet in July, 2012 gave approval for the establishment of an Enterprise Team to oversee the continued pursuit of the privatization of the railway services. The Development Bank of Jamaica (DBJ) was tasked to give support as transaction advisors. The privatization will be undertaken in two phases: 1) the Due Diligence and Business Case Development Phase; and 2) the Transaction Implementation Phase. Phase I involved the undertaking of a socio-economic survey and photo registry of informal residents along the Kingston to Montego Bay railway line. The Final Reports for this phase were submitted to the JRC in October 2014. Plans were developed to execute a Socio-Economic and Photo Registration Survey for May Pen to Frankfield and Spanish Town to Port Antonio Railway section of the line. For Phase II, a prospective bidder/investor was identified during the period and provided with an additional six months to complete its due diligence and to provide additional information on its financial and business models. The updated proposal is expected to be received by the end of March 2015, at which time the Jamaica Railway Corporation Enterprise Team (JRCET) is expected to

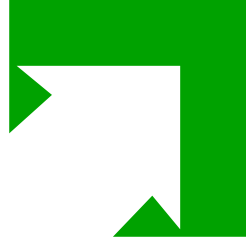
complete the evaluation and assessment of the proposal and provide its recommendation to Cabinet on the way forward.

Dry Dock Study

Funding was secured for this Study through the Commonwealth Secretariat. Subsequently, a Consultancy was engaged during 2014 and work commenced. The draft Study is to be completed by May 2015. Among the areas to be explored are: i) market analysis; ii) identification of sectors that would lend themselves to repair activities; ii) type of repair activity that would be required; iv) building blocks for training through the HEART/NTA Programme; and (v) the development of Business Models.

OUTLOOK

Higher real value added is anticipated for the Transport, Storage & Communication industry during 2015. This is linked to the forecasted expansion in economic activities both in the Transport & Storage and Communication segments of the industry. The anticipated expansion in the Transport & Storage sub-industry is predicated on increased activities at the island's sea and air ports, due to projected growth in stopover arrivals, and expansion in the volume of cargo handled at the ports, particularly due to the expected improvement in the performance of the bauxite/alumina exports, consequent on the likely rebound in alumina export. Growth in the Communication subcategory is predicated on ongoing expansion in telecommunication activities, due to continued competition and increased minutes sold. Further boost to the industry should result from the continuation and intensification of work on infrastructural projects, such as the North–South Link of Highway 2000; MIDP; JEEP; and programmes linked to the Growth Inducement Strategy. Downside risks to the industry in 2015 may stem from slower than expected growth with the main trading partners as well as unfavourable weather conditions, which would impact stopover arrivals. ■



TOURISM

INTRODUCTION

The Government of Jamaica through the Ministry of Tourism and Entertainment (MTE) continued to develop and implement policy initiatives and programmes aimed at enhancing growth within the Tourism sector and increasing its impact on the economy. The policy initiatives and programmes were focused on strengthening the linkages between Tourism and other industries, as well as facilitating increased investments and higher visitor arrivals. Against this background, real value added for the Hotels & Restaurants¹ industry grew by 2.9 per cent (Figure 17A) and contributed 0.2 per cent to growth in real value added during 2014. This was due to an increase in stopover arrivals, which reflected more visitors mainly from Europe, the United States of America (USA) and Canada. The improvement in stopover arrivals was facilitated by increased marketing efforts of the country as an inclusive destination; higher room stock as a result of hotel construction and expansion within the sector; as well as increased airlifts and higher load factors by some airlines. Additionally, there was growth in the number of cruise passenger arrivals and ship calls, which stemmed from more passengers visiting all cruise ports. Within the Caribbean, the Caribbean Tourism Organization (CTO) reported growth for most countries. The United Nations World Tourism

Organization (UNWTO) estimated that global tourist arrivals increased during 2014.

POLICIES & PROGRAMMES

The policies, programmes and projects of the Tourism sector continued to be guided by the: *Vision 2030 Jamaica – National Development Plan; the Growth Inducement Strategy; Medium Term Socio-Economic Policy Framework (MTF) {2012–2015}*; and the *Master Plan for Sustainable Tourism Development (Tourism Master Plan)*.

The major strategic policy objectives were to:

- enhance the linkages between Tourism and other industries with the aim of creating an inclusive sector
- improve the tourism product using internationally competitive standards
- enhance visitors’ experiences
- strengthen and position entertainment as a tool for development
- improve the welfare of tourism workers
- increase the economic impact of Tourism.

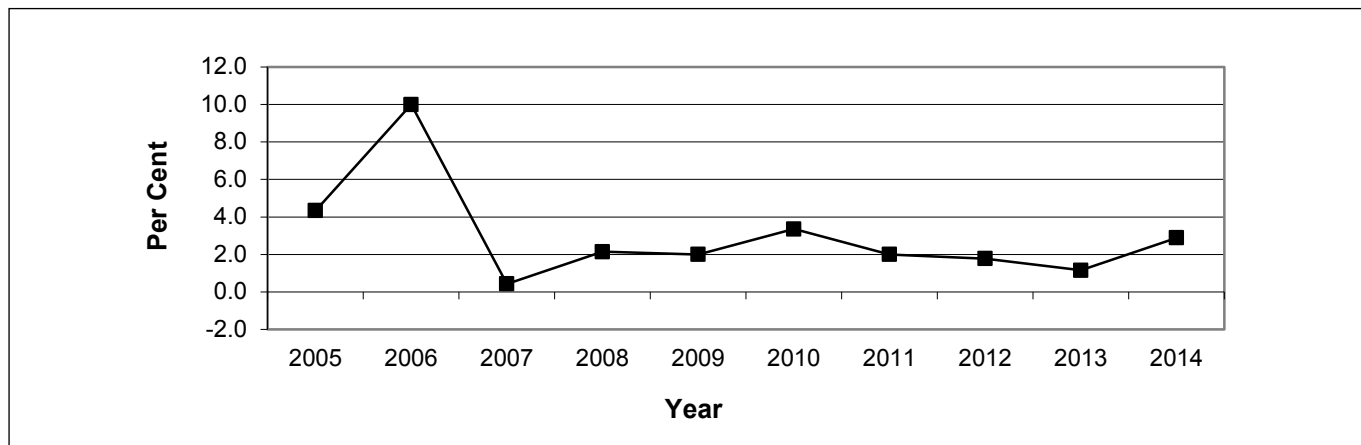


FIGURE 17A: CHANGE IN REAL VALUE ADDED FOR HOTELS & RESTAURANTS, 2005–2014

1. This industry captures most of tourism’s direct contribution to real value added.

STATUS OF MAJOR POLICIES AND PROGRAMMES

Pension Scheme for Tourism Workers

The Ministry of Tourism and Entertainment (MTE) continued to support the access of all tourism workers to pension benefits through the development of the Pension for Tourism Workers Policy, which was launched in 2012. This policy seeks to promote awareness among employers and workers of the benefits of pension and retirement planning. During 2014, a draft concept paper to guide the implementation process was completed and consultations are ongoing.

Community Based Tourism (CBT) Policy

The CBT policy is an important deliverable under the Rural Economic Development Initiative (REDI) project. The policy aims to facilitate community groups in the establishment of entrepreneurial initiatives, diversify the tourism product and improve the standard of living within these communities. The revision of the Green Paper was completed during 2014 and the Policy document will be submitted to Cabinet as a White Paper by the end of March 2015.

Art, Craft and Souvenir Policy

The MTE continued to work on developing an Art, Craft and Souvenir Policy during 2014. The policy seeks to facilitate incremental improvements in quality, variety, value, sales, customer satisfaction and profit. The policy also seeks to promote greater awareness of locally-produced items; encourage innovation; improve packaging; implement regulations; create production and distribution facilities; and strengthen linkages within the economy. In 2014, Cabinet approved the establishment of a Craft Council which will streamline the governance and development of craft including oversight of the development of the Craft Policy. The inaugural meeting of the Council was held in September 2014. The Policy is expected to be completed by October 2015.

Tourism Linkages with Other Sectors

In achieving a higher degree of integration and increased tourism economic impact, the MTE focused on strategies to strengthen the local value chain with Agriculture, Manufacture, Entertainment and Sport through the work of the Tourism Linkages Hub. In 2014, the Hub continued to drive initiatives such as:

- The undertaking of a demand study to quantify the potential for linkages between Tourism and other industries of the economy. This will drive the efforts of the Tourism Linkages Hub within the MTE. A tourism demand assessment consultancy began, the data collection process commenced in September and the study is expected to be completed within six months.
- The facilitation of direct buyer/supplier networking opportunities and interactions which included the co-

hosting of the Jamaica Product Exchange (JAPEX). Approximately 38 suppliers participated from the following product categories: Furniture & Bedding; Food & Beverage; Textile & Sewn Products; Chemicals & Industrial Supplies; Cosmetics & Aromatherapy; Printing & Packaging; Creative Industries (art, gift, craft); and Agricultural Produce & Services. Contacts were established and leads generated between participating buyers and suppliers. Arising from this event, three companies reported that orders and contracts were received to supply bedding, bags/cases and ceramic items at a cumulative value of over \$4.0 million.

- The hosting of Agro-Tourism Farmers' Markets in Negril continued to be successful because of the absence of a municipal market in the parish. From this staging, at least four contractual arrangements were established between farmers and hotels to supply produce on a weekly basis.

The Multi-Hazard Contingency Programme

The MTE, with the assistance of the National Environment & Planning Agency and the Office of Disaster Preparedness and Emergency Management (ODPEM), continued to implement activities under component three of the programme. Component three involves the development of the Climate Risk Atlas for Negril (see Chapter 25).

TOURISM LEGISLATIVE PROGRAMME

Timeshare Legislation

Vacation Ownership is one of the fastest growing sectors of the global hospitality industry and there is huge potential for the Timeshare product to be developed in Jamaica. Accordingly, the Ministry has introduced the Vacation Ownership & Timeshare programme into Jamaica's tourism product.

In 2014, the Timeshare Vacations Bill was passed by the Legislative Committee and approved for tabling by the Cabinet in April. The Bill was tabled in both Houses of Parliament. The Bill received the Governor General's approval in December and will be effected in 2015. The Act will give legal recognition to timeshare and vacations scheme clubs and will also make provisions to regulate the marketing, promotion and provision of timeshare accommodations.

INCENTIVES

The Fiscal Incentives (Miscellaneous Provisions) {FIMP} Act, 2013 was passed in January 2014. This Act seeks to provide increased access to operators for Tourism accommodation incentives. The Attractions and Car Rental sub-sectors also started to benefit from this legislation. Several changes were made to the FIMP to further benefit the industry, which included the:

- Amendment of the Act in June 2014 to include licensed tourism car rental operators. As a result of

this amendment, motor vehicles with cc ratings up to a maximum of 2500 and Cost, Insurance and Freight value up to US\$35 000 can now be accessed at 100.0 per cent relief on the applicable Common External Tariff.

- Amendment of the Product Input Relief (PIR) listing for Accommodations and Attractions sub-sectors in December 2014. The PIR listing for the accommodation sub-sector has been expanded to include a defined list of building materials as well as additional operational items. Since April 2014, approximately 14 attractions (11 existing and 3 new) and 31 accommodations (27 existing and 4 new) have benefited under the FIMP Act, 2013.

TOURISM ENHANCEMENT FUND (TEF)

During 2014, the Tourism Enhancement Fund (TEF) and the Tourism Product Development Company (TPDCo) embarked on a programme that will impact the development and attractiveness of: (i) resort towns islandwide; (ii) signature attractions; (iii) rest stops; (iv) the Milk River Hotel & Spa and Bath Fountain Hotel & Spa; and (v) 12 beach parks.

Projects undertaken during the year included:

- The completion of the renovation on the Ocho Rios Cruise Ship Terminal. The rehabilitation of the facility included the upgrading and expansion of the parking area and the renovation of the terminal building.
- The upgrading of the Hampden Wharf Development in Falmouth, Trelawny. A Streetscape Improvement Project was also executed.
- The conversion of the civic centre to the Montego Bay Cultural Centre, which houses the National Art Gallery West, a museum, a space for the performing arts and a bistro.
- The lighting for the 17 km roadway of Montego Bay's Elegant Corridor between the Sangster International Airport and the Iberostar Resort. This work is scheduled to be completed in 2015.

The Tourism Improvement Programme represents TEF's contribution to the Government's Jamaica Emergency Employment Programme (JEEP) and is aimed at improving the tourism product in resort areas by providing short-term employment through labour intensive programmes and projects. Phase two was completed in March 2014, with approximately \$396.0 million being disbursed and 3 152 persons employed. Work on Phase three continued during the year and is expected to be completed in March 2015.

The TEF revolving loan facility is administered by the Jamaica National Small Business Loans (JNSBL), which targets individuals and companies which provide services to the Tourism Sector. This is consistent with the objectives

of the Tourism Enhancement Act. The initial agreement stipulated a maximum loan amount of \$3.0 million with repayment over a period of three years. As at February 2011, the TEF/JNSBL agreed to extend the loan programme which provided individuals and companies with access to a maximum of \$5.0 million with a repayment period of five years and 5.0 per cent interest rate per annum on the reducing balance. Total loans issued as at December 31, 2014 were valued at \$447.6 million with 186 clients benefitting. This compared with \$354.0 million and 145 clients benefitting at the end of 2013. Additionally, \$20.0 million was approved and disbursed during 2014 to fund the new Energy Efficiency Loan Programme.

MARKETING & PROMOTION

The Jamaica Tourist Board (JTB), through its marketing activities, maintained and reinforced a positive image of Jamaica in the various target markets. The new advertising campaign 'Home of All Right' was created to convey that Jamaica is a diverse and cultural destination in addition to being a vacation getaway. The traditional channels of electronic media (network and cable TV, radio, cinema screens); print (magazines and newspapers) and online advertising continued to play a role. Other formats of advertising were utilised such as: Taxi Tops, Outdoor, Online Display Banners and sides of buses.

Other marketing and promotional activities undertaken by the JTB included:

- **Consumer & Trade Shows:** The JTB has been actively involved in several targeted events including ITB Berlin, Caribbean Travel Marketplace, World Travel Market, ITME, IMEX and other trade shows. Locally, the JTB and JHTA continued to assist in coordinating the Jamaica Product Exchange (JAPEX), the island's premier travel trade show.
- **Familiarisation Tours:** The JTB sponsored several familiarization tours with representatives from the USA, Canada, the United Kingdom (UK) and Europe (Russia and 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; the monitoring of Tourism Action Clubs in 85 schools; the enabling of participation of Jamaican students in several CTO-organized competitions; and collaboration with the JTB for the hosting of activities such as the Tourism Outlook Seminar.
- **Website Development:** The JTB focused on revamping its www.visitjamaica.com website to encompass the images of "Home of All Right" campaign. The website continued expanding its web-based marketing campaign through social networking

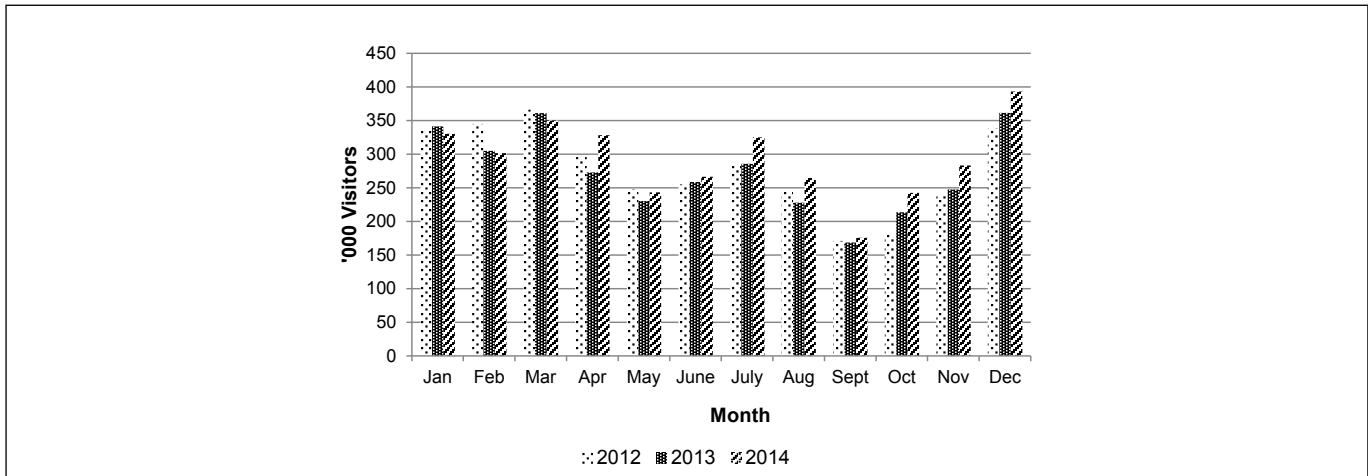


FIGURE 17B: TOTAL VISITOR ARRIVALS BY MONTH, 2012–2014

and internet media channels including Twitter, Facebook, YouTube, Island Buzz (destination blog site), and Pinterest.

- **Emerging Market Activities:** Participated at major travel events in the emerging markets of Latin America, Continental Europe, Russia and China as well as focused on the rebuilding of the Japanese market. This translated into additional flights from the USA, UK, Scandinavia and Russia during the year.
- **Destination Enhancement:** During 2014, approximately 224 journalists were hosted from all major source markets. Media from the emerging markets were also facilitated. Events facilitated through sponsorship or endorsement were: Rebel Salute, Jamaica Jazz & Blues Festival, Carnival in Jamaica, All Jamaica 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, Tourism Awareness in Schools & Communities and Media Relations.

TOURISM TRAINING

In 2014, the Tourism Product Development Company Limited (TPDCo) aimed to enhance visitor experience through the **Tourism Worker Skills Training Programme** and to facilitate collaboration with community groups under the **Tourism Inclusiveness Programme**.

- **Tourism Worker Skills Training Programme:** The TPDCo delivered 69 Skills Upgrading and 138 Team Jamaica programmes to 1 992 and 3 028 participants, respectively. These programmes included: Tour Guiding Skills; Entrepreneurial Skills (Craft);

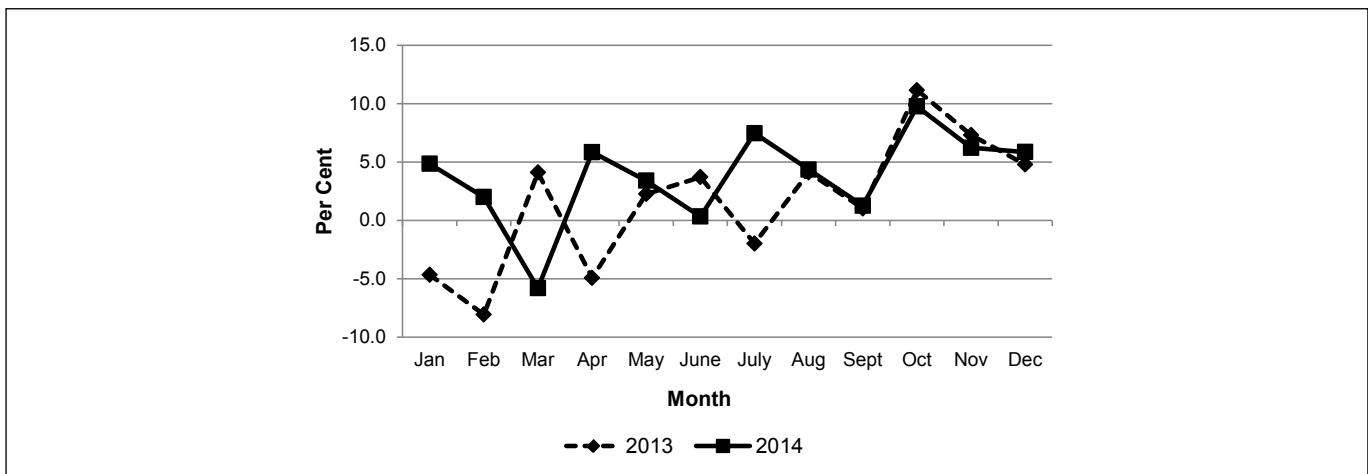


FIGURE 17C: PERCENTAGE CHANGE IN STOPOVER ARRIVALS BY MONTH, 2013–2014

TABLE 17.1
TOURISM PERFORMANCE INDICATORS, 2010–2014

INDICATORS	2010	2011	2012	2013 ^r	2014 ^p	% Change	% Change
						2013 2012	2014 2013
Foreign Nationals	1 768 810	1 800 280	1 832 329	1 860 935	1 929 454	1.6	3.7
Non-Resident Jamaicans	152 868	151 472	153 756	147 474	150 727	-4.1	2.2
STOPOVER ARRIVALS	1 921 678	1 951 752	1 986 085	2 008 409	2 080 181	1.1	3.6
Cruise Passengers	909 619	1 125 481	1 320 083	1 265 268	1 423 797	-4.2	12.5
TOTAL VISITOR ARRIVALS	2 831 297	3 077 233	3 306 168	3 273 677	3 503 978	-1.0	7.0
Average Length of Stay (Nights) ^a	9.0	8.9	8.8	8.7	8.7	-1.1	0.0
Total Foreign Exchange Earnings (US\$M)	2 001.2	2 008.4	2 069.6	2 112.6	2 235.7	2.1	5.8
Stopover Foreign Exchange Earnings (US\$M)	1 921.9	1 928.0	1 967.9	2 011.0	2 111.8	2.2	5.0
Cruise Passenger Foreign Exchange Earnings (US\$M)	79.3	80.5	101.7	101.5	123.9	-0.2	22.0

p-preliminary

r-revised

a-Average Length of Stay for Foreign Nationals

Source: Compiled from data supplied by the Jamaica Tourist Board

Customer Service Excellence; and Foreign Language – Basic Conversational Spanish and Russian.

- **Tourism Inclusiveness Programme:** Under this initiative, seven workshops in creating items made of fibre were completed. A total of 30 artisans were trained and an exhibition was held in December 2014 to showcase their products.

PERFORMANCE

Total Visitor Arrivals

During 2014, total visitor arrivals increased by 7.0 per cent to 3 503 978 persons (Table 17.1). There were increased

visitor arrivals for all months, with the exception of January, February and March (Figure 17B). For January–June and July–December of 2014, total visitor arrivals increased by 2.8 per cent to 1 819 339 persons and by 12.0 per cent to 1 684 639 persons, respectively. This increase was the result of growth in both the number of stopover and cruise passenger arrivals.

Stopover Arrivals

The number of stopover arrivals grew by 3.6 per cent to 2 080 181 persons in 2014 (Table 17.1). This performance was due mainly to increased arrivals from Jamaica's three major source markets, which was facilitated by increased airlift from the USA, Canada and Europe.

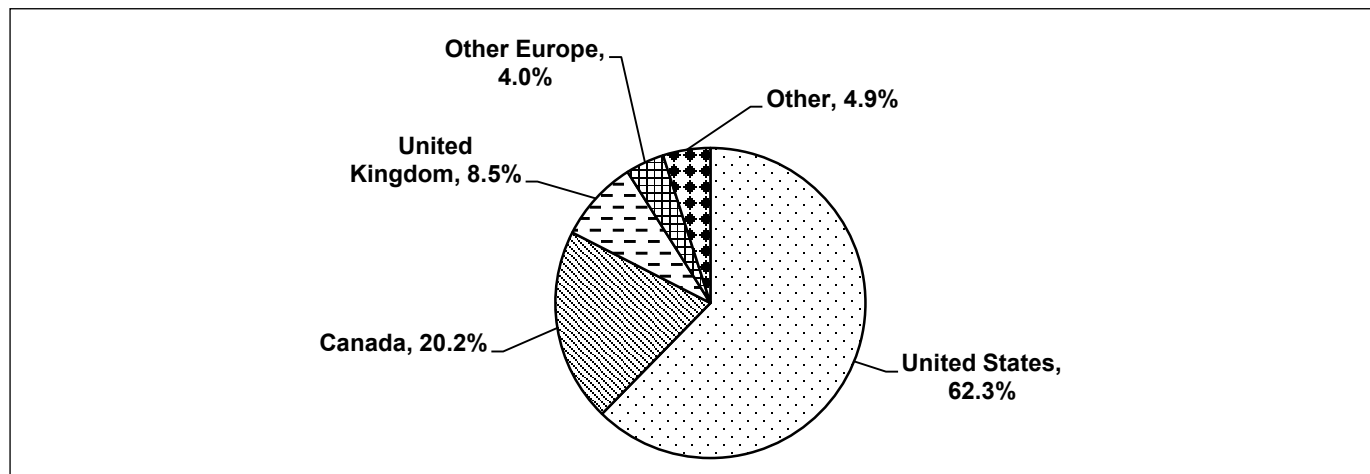


FIGURE 17D: SHARE OF STOPOVER ARRIVALS BY SOURCE MARKET, 2014

TABLE 17.2
STOPOVER ARRIVALS TO JAMAICA BY SOURCE MARKET, 2010–2014

	2010		2011		2012		2013		2014		% Change 2014/13
	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	Stopover	% Share	
United States	1 242 943	64.7	1 225 565	62.8	1 257 669	63.3	1 271 262	63.3	1 296 457	62.3	2.0
Canada	325 191	16.9	378 938	19.4	403 200	20.3	399 331	19.9	419 898	20.2	5.2
Europe of which:	271 315	14.1	253 045	13.0	222 428	11.2	235 811	11.7	261 081	12.6	10.7
United Kingdom	184 355	9.6	173 507	8.9	145 231	7.3	151 315	7.5	177 216	8.5	17.1
Germany	18 857	1.0	19 939	1.0	20 236	1.0	19 658	1.0	21 346	1.0	8.6
Spain	10 082	0.5	6 833	0.4	4 350	0.2	2 569	0.1	2 537	0.1	-1.2
Italy	13 700	0.7	11 700	0.6	9 672	0.5	7 808	0.4	8 692	0.4	11.3
Other Europe	44 321	2.3	41 066	2.1	42 939	2.2	54 461	2.7	51 290	4.0	-5.8
Caribbean	58 299	3.0	66 216	3.4	64 984	3.3	58 249	2.9	59 057	2.8	1.4
Latin America	13 442	0.7	16 589	0.8	25 037	1.3	30 538	1.5	29 263	1.4	-4.2
Asia	5 791	0.3	6 522	0.3	7 020	0.4	7 505	0.4	8 194	0.4	9.2
Other Countries	4 697	0.2	4 877	0.2	5 747	0.3	5 713	0.3	6 231	0.3	9.1
TOTAL	1 921 678	100.0	1 951 752	100.0	1 986 085	100.0	2 008 409	100.0	2 080 181	100.0	3.6

Source: Compiled from data supplied by the Jamaica Tourist Board

For January–June 2014, the number of stopover arrivals grew by 1.4 per cent to 1 074 336 persons relative to 2013. This reflected an increase in all six months, with the exception of March (Figure 17C). The decrease in stopovers for March was a result of the Easter holidays falling in April this year relative to March in 2013. For the latter half of the year, the number of stopover arrivals increased by 6.0 per cent to 1 005 845 persons. The Foreign Nationals² and Non-Resident Jamaicans categories grew by 3.7 per cent to 1 929 454 persons and 2.2 per cent to 150 727 persons, respectively (see Table 17.1). The average length of stay for Foreign Nationals remained flat at 8.7 nights for 2014 while the average length of stay for Non-Resident Jamaicans fell to 16.5 nights from 16.8 nights in 2013.

Stopover Arrivals from Jamaica's Main Source Markets Europe

Visitors from Europe rose by 10.7 per cent to 261 081 and accounted for 12.6 per cent of stopover arrivals. This increase reflected improvements in the Northern and Southern/Western regions. Stopover visitors from Northern and Southern/Western Europe increased by 19.8 per cent and 2.6 per cent to 190 068 and 61 177, respectively. The improved performance from Northern Europe was due mainly to an increase in arrivals from the United Kingdom, which rose by 17.1 per cent to 177 216 persons (Table 17.2). Stopover arrivals from Central/East Europe decreased by 43.7 per cent to 9 836 persons. The higher number of stopover arrivals from Europe emanated primarily from additional flights by British Airways

and Thomson Airways. Thomson Airways increased service out of Manchester, England as at October 2014 from once per week to twice and introduced new fortnightly services from Helsinki, Finland and Copenhagen, Denmark.

United States of America

The USA continued to account for the largest share of stopover arrivals to Jamaica, representing 62.3 per cent of total visitors (Figure 17D). The number of stopover arrivals from the USA totalled 1 296 457, up 2.0 per cent relative to 2013 (see Table 17.2). This was a consequence of increased arrivals from all regions. The number of stopovers from the South increased by 4.6 per cent to 339 746 persons and visitors from the West region rose by 5.4 per cent to 140 714. Also, stopover arrivals from the Midwest (up 0.9 per cent) and Northeast³ (up 0.1 per cent) regions amounted to 244 696 individuals and 571 301 individuals, respectively. The increase in stopovers from the USA was largely attributed to: (i) additional flights by AirTran Airways and US Airways; and (ii) greater frequency of flights by Jet Blue, Southwest Airlines, Delta Airlines and United Airlines.

Canada

Arrivals from Canada amounted to 419 898 persons, an increase of 5.2 per cent relative to 2013 (see Table 17.2). Canada accounted for 20.2 per cent of stopover visitors to the island. This was a result of: Air Canada Rogue's daily flights between Toronto and Montego Bay, which commenced on November 8, 2013; increased seating capacity by Air Canada

2. This category accounted for approximately 93.0 per cent of stopover visitors during 2014.

3. The Northeast region typically accounts for the majority of visitors from the US market followed by the South. For 2014, the Northeast and South regions represented 44.1 per cent and 26.2 per cent of stopover visitors from the USA, respectively.

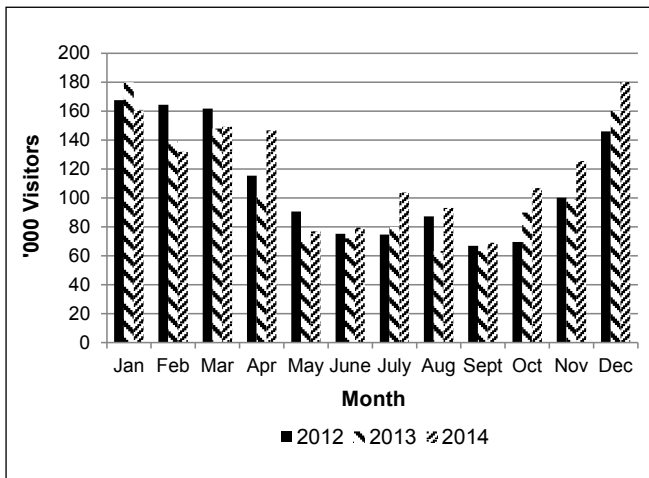


FIGURE 17E: CRUISE PASSENGER ARRIVALS BY MONTH, 2012–2014

Rogue and Transareo; and higher load factors for Air Canada, Westjet and Sunwing Airlines.

Caribbean

Visitors from the Caribbean increased by 1.4 per cent to 59 057. Higher stopovers were influenced primarily by more arrivals from the Turks & Caicos Islands, Guyana, Cuba, The Dominican Republic and the British Virgin Islands.

Latin America

Stopovers from Latin America fell by 4.2 per cent to 29 263. Lower arrivals from this market reflected mainly

fewer visitors from Costa Rica, Argentina, Chile, Venezuela and Guatemala.

CRUISE PASSENGER ARRIVALS

Cruise passenger arrivals grew by 12.5 per cent to 1 423 797 (see Table 17.1 and Figure 17E). Consistent with this growth was an increase in the number of ship calls to 412 from 360 in 2013. This improvement reflected increased activities at the Falmouth, Montego Bay, Ocho Rios and Port Antonio cruise piers.

For the first six months of 2014, there were increases of 5.0 per cent in the number of cruise passenger arrivals to 745 003 and 7.7 per cent in the number of cruise ship calls to 224. During the latter half of the year, there was a 22.2 per cent increase in cruise passenger arrivals to 678 794 and a 23.7 per cent upturn in the number of ship calls to 188. For both 2013 and 2014, there were higher passenger load factors during July–December relative to January–June.

Falmouth

The number of ship calls to Falmouth totalled 187 during 2014 with a total of 772 265 cruise passengers (Table 17.3 and Figure 17F). The number of persons visiting Falmouth represented 54.2 per cent of total cruise passengers. Approximately 49.0 per cent of cruise passengers participated in tours during 2014 compared with 49.4 per cent in 2013. Of the total visiting Falmouth, 295 174 participated in pre-booked tours, an increase of 19 522 persons relative to 2013. A total of 83 175 persons participated in freelance tours compared with 43 827 persons in 2013.

**TABLE 17.3
CRUISE PASSENGERS TO FALMOUTH, 2013–2014**

	2013					2014				
	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	92 553	36 580	6 258	42 838	46.3	84 199	29 555	9 352	38 907	46.2
February	75 067	32 708	4 356	37 064	49.4	63 389	24 194	6 306	30 500	48.1
March	83 411	40 041	4 657	44 698	53.6	72 888	30 050	6 903	36 953	50.7
April	56 991	26 646	3 015	29 661	52.0	85 004	35 320	8 115	43 435	51.1
May	36 366	16 975	2 176	19 151	52.7	50 490	20 320	3 860	24 180	47.9
June	33 617	16 421	1 932	18 353	54.6	48 794	20 225	3 431	23 656	48.5
July	40 002	19 695	2 748	22 443	56.1	59 764	27 138	6 842	33 980	56.9
August	33 631	15 096	2 158	17 254	51.3	52 808	22 236	5 465	27 701	52.5
September	30 395	11 872	1 829	13 701	45.1	44 188	15 869	5 865	21 734	49.2
October	45 190	17 396	3 600	20 996	46.5	61 618	20 690	9 120	29 810	48.4
November	46 927	16 937	3 489	20 426	43.5	62 775	21 386	7 169	28 555	45.5
December	72 286	25 285	7 609	32 894	45.5	86 348	28 191	10 747	38 938	45.1
Total	646 436	275 652	43 827	319 479	49.4	772 265	295 174	83 175	378 349	49.0

Note: a+b=c

Source: Compiled from data supplied by the Falmouth Cruise Pier

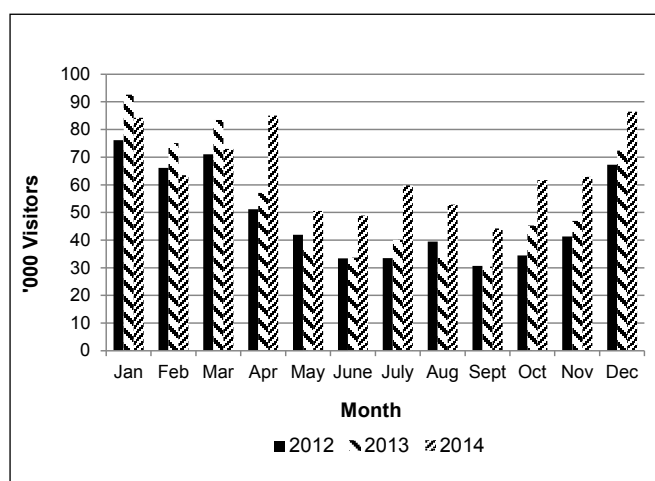


FIGURE 17F: CRUISE PASSENGERS TO FALMOUTH BY MONTH, 2012–2014

Montego Bay

Montego Bay received a total of 240 083 cruise passengers compared with 237 956 in 2013 (Table 17.4 and Figure 17G). The number of ship calls remained flat at 86 during 2014. The number of passengers visiting Montego Bay accounted for 16.9 per cent of total cruise arrivals. Approximately 79.1 per cent of cruise passengers participated in tours during the period compared with 85.2 per cent in 2013. Participation in pre-booked tours totalled 128 560 compared with 136 575 in 2013

(see Table 17.4). The number of passengers who participated in freelance tours was 61 228 relative to 66 165 in 2013.

Ocho Rios and Port Antonio

A total of 410 090 cruise passengers visited Ocho Rios, an increase of 7.7 per cent compared with 2013 (Figure 17H). The number of ship calls rose by 10.0 per cent to 132 during 2014. This improvement was facilitated by the renovation of the cruise ship terminal. During the review period, cruise passenger arrivals amounted to 1 359 persons for Port Antonio, which was facilitated by seven ship calls.

EXPENDITURE

Provisional visitor expenditure amounted to US\$2 235.7 million, 5.8 per cent more than in 2013. Of this amount, stopover visitors expended US\$2 111.8 million while cruise passengers spent US\$123.9 million (Figures 17I and 17J). This compares with stopover and cruise passenger expenditure amounting to US\$2 011.0 million and US\$101.5 million during 2013, respectively. For 2014, the daily average expenditure per stopover visitor amounted to US\$109.57, higher than US\$107.73 in 2013. Similarly, average expenditure per cruise passenger was US\$87.03 relative to US\$80.25 during 2013.

EMPLOYMENT⁴

The average annual employment in the Hotels and Restaurants industry was 80 500 persons compared with 75 750 persons during 2013. This represented approximately 7.1 per cent of total employment for 2014 and 6.8 per cent

TABLE 17.4
CRUISE PASSENGERS TO MONTEGO BAY, 2013–2014

	2013					2014				
	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	41 692	22 397	12 861	35 258	84.6	27 827	15 952	7 480	23 432	84.2
February	23 392	14 121	5 791	19 912	85.1	20 230	11 774	5 153	16 927	83.7
March	24 514	13 926	7 139	21 065	85.9	25 364	14 610	6 811	21 421	84.5
April	16 773	10 476	4 656	15 132	90.2	18 918	10 326	4 991	15 317	81.0
May	15 641	9 894	3 784	13 678	87.4	16 352	9 375	3 865	13 240	81.0
June	11 391	8 379	2 839	11 218	98.5	13 097	7 944	3 440	11 384	86.9
July	16 561	10 822	4 257	15 079	91.1	22 625	13 076	5 950	19 026	84.1
August	10 928	5 800	3 307	9 107	83.3	17 763	9 298	5 088	14 386	81.0
September	12 227	7 307	3 224	10 531	86.1	11 868	6 101	3 124	9 225	77.7
October	16 332	8 490	4 798	13 288	81.4	22 504	11 266	6 083	17 349	77.1
November	14 575	6 891	3 410	10 301	70.7	17 237	8 512	4 252	12 764	74.1
December	33 930	18 072	10 099	28 171	83.0	26 298	14 516	6 997	21 513	81.8
Total	237 956	136 575	66 165	202 740	85.2	240 083	128 560	61 228	189 788	79.1

Note: a+b=c

Source: Compiled from data supplied by the Montego Bay Cruise Pier

4. STATIN's estimates.

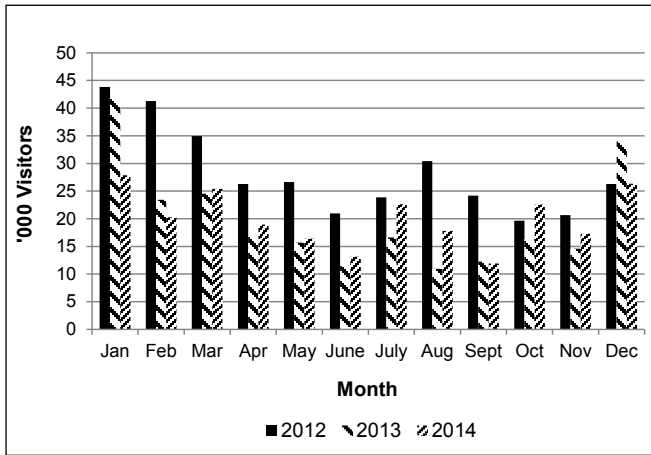


FIGURE 17G: CRUISE PASSENGER ARRIVALS TO MONTEGO BAY BY MONTH, 2012–2014

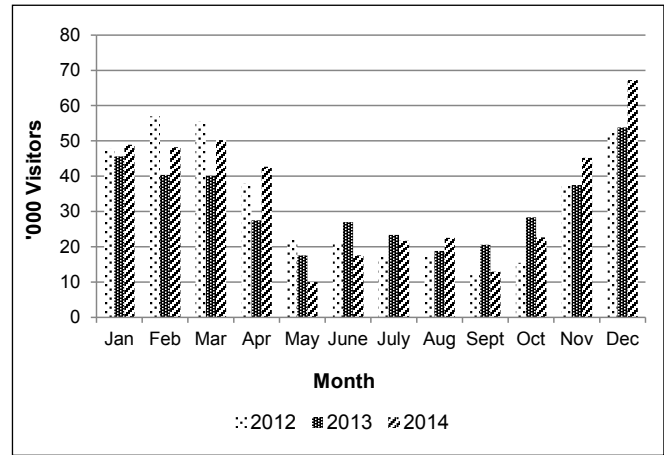


FIGURE 17H: CRUISE PASSENGER ARRIVALS TO OCHO RIOS BY MONTH, 2012–2014

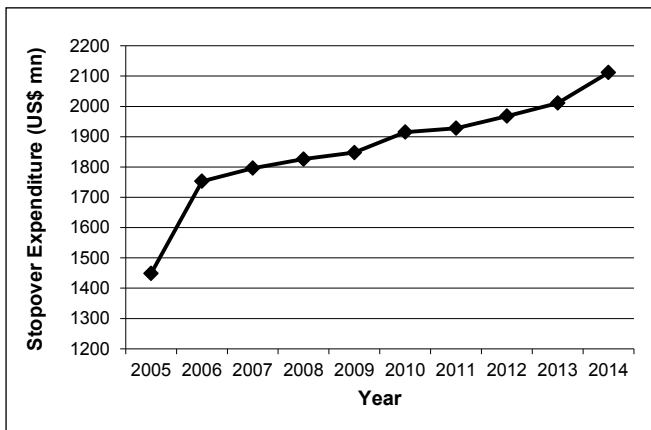


FIGURE 17I: STOPOVER EXPENDITURE, 2005–2014

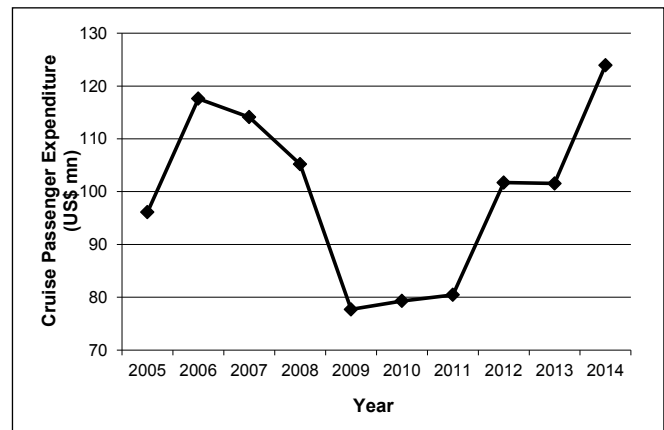


FIGURE 17J: CRUISE PASSENGER EXPENDITURE, 2005–2014

for 2013. The average number of males employed within the industry totalled 31 925 relative to 31 375 in 2013. For females, the average number employed was 48 575 compared with 44 375 in 2013. The increase in employment was attributed to the renovation of existing as well as the opening of new hotels and restaurants which was associated with the higher demand from international visitors. Notably, Hyatt Ziva and Hyatt Zilara Rose Hall were opened in December 2014 and the Morgan’s Harbour Hotel was refurbished during the review period and rebranded as Grand Port Royal Marina and Spa.

LOANS & ADVANCES

At the end of 2014, the stock of Loans & Advances to the industry by commercial banks was \$29.7 billion compared with \$27.5 billion at the end of 2013. The stock of Loans & Advances to the industry from institutions licensed under the Financial Institutions Act at the end of 2014 was \$261.2

million relative to \$201.4 million at the end of 2013. The improved loan stock emanated from increased financing owing to new construction activity within the Hotel segment of the industry.

CARIBBEAN AND INTERNATIONAL DEVELOPMENTS

Caribbean Tourism Performance ⁵

Stopover Visitor Arrivals

Data from the Caribbean Tourism Organization (CTO) showed that there was growth in stopover arrivals. Of the 27 reporting countries, 21 registered increases, four declined and one remained flat during 2014. No data was reported for Trinidad & Tobago during 2013. The Dominican Republic (up 9.6 per cent), Cuba (up 5.3 per cent), Jamaica (up 3.6 per cent), Puerto Rico (up 6.6 per cent) and Aruba (up 9.5 per cent) accounted for approximately 64.5 per cent of stopover

5. This section is based on the most current information from the Caribbean Tourism Organization.

TABLE 17.5
STOPOVER ARRIVALS TO THE CARIBBEAN, 2014

COUNTRY	PERIOD	2014	% Change 2014/2013
ANGUILLA	JAN-NOV	62 353	2.2
ANTIGUA & BARBUDA ^a	JAN-DEC	249 316	2.5
ARUBA	JAN-DEC	1 072 082	9.5
BAHAMAS ^p	JAN-JUL	924 898	3.5
BARBADOS ^p	JAN-NOV	458 510	0.2
BELIZE ^p	JAN-DEC	321 217	9.2
BERMUDA ^a	JAN-NOV	212 125	-5.2
BRITISH VIRGIN ISLANDS	JAN-NOV	337 843	3.0
CAYMAN ISLANDS	JAN-DEC	382 816	10.8
CUBA	JAN-DEC	3 001 958	5.3
CURACAO	JAN-DEC	450 953	2.5
DOMINICA ^p	JAN-DEC	81 159	3.7
DOMINICAN REPUBLIC ^a	JAN-DEC	5 141 377	9.6
GRENADA ^p	JAN-DEC	133 521	18.4
HAITI	JAN-DEC	465 174	10.8
JAMAICA	JAN-DEC	2 080 181	3.6
MARTINIQUE	JAN-DEC	489 561	0.0
MONTSERRAT	JAN-OCT	6 293	13.5
PUERTO RICO ^b	JAN-OCT	1 405 390	6.6
ST. LUCIA	JAN-DEC	338 158	6.1
ST. KITTS & NEVIS ^d	JAN-AUG	74 317	-26.4
ST. MAARTEN ^a	JAN-SEP	377 341	7.3
ST. VINCENT & THE GRENADINES	JAN-NOV	61 684	-1.2
SURINAME	JAN-JUL	140 878	1.4
TRINIDAD & TOBAGO ^c	JAN-DEC	412 537	-
TURKS & CAICOS ISLANDS	JAN-NOV	368 164	40.6
U.S. VIRGIN ISLANDS	JAN-NOV	655 477	3.9

a-Non-Resident Air Arrivals

b-Non-Resident Hotel Registrations Only

c-Air Arrivals by Nationality

d-Excludes data from Vance M. Amory International Airport in Nevis

p-preliminary

N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

visitors to the Caribbean (Table 17.5). There were declines in stopover arrivals for Bermuda (5.2 per cent) and St. Vincent & the Grenadines (1.2 per cent).

Cruise Passenger Arrivals

The CTO revealed that 20 of the 23 reporting Caribbean countries registered higher cruise passengers arrivals during 2014. Passengers from The Bahamas (2.9 per cent), U.S. Virgin Islands (4.3 per cent), Cayman Islands (17.0 per cent), St. Maarten (15.9 per cent), Jamaica (12.5 per cent) and Puerto Rico (13.6 per cent) {Table 17.6}, accounted for approximately 60.3 per cent of cruise visitors to the

Caribbean. Declines in cruise passenger arrivals were from: Aruba (1.3 per cent), Barbados (2.3 per cent), and Antigua & Barbuda (2.2 per cent).

International Tourism Performance⁶

The UNWTO estimated that international tourist arrivals grew by 4.7 per cent to 1 138.0 million during 2014. The number of international tourist arrivals was 51.0 million more than in 2013 and this represented the fifth consecutive year of above average growth since the 2009 economic crisis.

6. This section is based on the most current information from the World Tourism Organization.

TABLE 17.6
CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN, 2014

COUNTRY	PERIOD	2014	% Change 2014/2013
ANTIGUA & BARBUDA	JAN-DEC	522 342	-2.2
ARUBA	JAN-NOV	584 728	-1.3
BAHAMAS	JAN-OCT	3 867 574	2.9
BARBADOS	JAN-NOV	479 659	-2.3
BELIZE	JAN-DEC	968 131	42.9
BERMUDA	JAN-NOV	358 640	5.7
BRITISH VIRGIN ISLANDS	JAN-NOV	301 884	1.4
CAYMAN ISLANDS	JAN-DEC	1 609 555	17.0
CURACAO	JAN-DEC	629 145	6.8
DOMINICA	JAN-DEC	286 573	24.3
DOMINICAN REPUBLIC	JAN-SEP	317 365	11.1
GRENADA	JAN-DEC	235 140	19.2
HAITI	JAN-DEC	662 403	2.9
JAMAICA	JAN-DEC	1 423 797	12.5
MARTINIQUE	JAN-DEC	177 786	71.3
PUERTO RICO	JAN-NOV	1 154 078	13.6
ST. LUCIA	JAN-DEC	641 452	8.0
ST. KITTS & NEVIS	JAN-AUG	434 106	16.9
ST. MAARTEN	JAN-OCT	1 543 572	15.9
ST. VINCENT & THE GRENADINES	JAN-NOV	69 481	6.3
TRINIDAD & TOBAGO	JAN-DEC	42 820	30.1
TURKS & CAICOS ISLANDS	JAN-DEC	971 838	24.8
U.S. VIRGIN ISLANDS	JAN-DEC	2 083 890	4.3

N.B.: Figures subject to revision by reporting countries

Source: Caribbean Tourism Organization

Tourist arrivals to Europe grew by 4.0 per cent to 588.4 million and accounted for approximately 52.0 per cent of visitors globally. Growth in the region was driven by increased arrivals to the Northern European and Southern Mediterranean destinations.

Tourist arrivals to the Asia & the Pacific region increased by 5.0 per cent to 263.0 million and represented approximately 23.1 per cent of global visitors. Growth was supported by more tourists visiting North-East Asia, South Asia, Oceania and South-East Asia.

The Americas registered an increase of 7.0 per cent in tourist arrivals to 180.6 million and accounted for approximately 15.9 per cent of international visitors. All four sub-regions registered growth with North America (up 10.5 per cent) being the most significant contributor to the improved performance of the Americas. Additionally, there were higher tourist arrivals to South America (2.5 per cent); the Caribbean (2.0 per cent); and Central America (0.8 per cent).

Visitor arrivals to Africa during 2014 grew by 2.0 per cent to 56.0 million and accounted for approximately 4.9 per cent of global visitors. This improvement was a result of increased

arrivals to both sub-regions, with Sub-Saharan destinations (up 3.2 per cent) and North Africa (up 1.7 per cent). The Middle East grew by 4.0 per cent to 50.3 million persons and accounted for approximately 4.4 per cent of international visitors in 2014.

OUTLOOK

Real value added for the Hotels & Restaurants industry is expected to increase during 2015. This growth is predicated on higher stopover arrivals, which are associated primarily with an anticipated increase in the frequency of flights and the addition of new flights by some airlines. Also, higher cruise passenger arrivals are expected, stemming from the introduction of new cruise vessels (Star Flyer, Silver Explorer, Norwegian Gateway, Anthem of the Seas and Britannia) during 2015.

The Ministry's Tourism Linkages Hub, in collaboration with the JHTA, the Jamaica Manufacturers' Association and other partner entities hosted the inaugural Tourism Linkages Speed Networking event on January 21, 2015 at the Half Moon Conference Centre in Montego Bay. The innovative networking event entailed a series of 15-minute meetings

between senior management of manufacturing companies and owners as well as managers of hotels, restaurants, attractions and other tourism entities. Another speed networking event is scheduled for 2015 given the success of the first one.

Furthermore, there are increased employment prospects for the Hotels & Restaurants industry as there are several hotels planning to open new and refurbished properties during 2015. Notably, 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 by July; and Moon Palace Jamaica Grande Resort and Spa

is expected to open in April with a staff complement of over 1 000 persons.

The UNWTO forecasts growth in global tourist arrivals within the range of 3.0 per cent and 4.0 per cent in 2015. It is anticipated that the main drivers of this growth will stem from increased arrivals from the regions of Asia & the Pacific and the Americas (4.0 per cent to 5.0 per cent); and Europe (3.0 per cent to 4.0 per cent). The forecast for 2015 is predicated on increased demand for global transportation as a result of lower crude oil prices on the international market. ■

ENTERTAINMENT & SPORT

INTRODUCTION

For 2014, growth of 1.2 per cent was recorded for the Other Services Industry. The Recreational, Cultural and Sporting (RCS) sub-industry accounts for approximately one-third of Other Services, and captures the majority of entertainment activities.

During the year, there was an emphasis on policy development in entertainment and sports, particularly with respect to intellectual property and athletics. Economic activity related to entertainment showed signs of improvement evidenced by higher gross sales to entertainment categories; increases in the volume and value of amusement licences issued; and an increase in the stock of Loans and Advances issued for entertainment purposes. With respect to sports, the Sports Development Foundation increased its expenditure on infrastructure projects in various disciplines.

In 2013, real value added for the RCS sub-industry¹ increased by 0.4 per cent, which represented a slowing in the rate of growth for the sub-industry. There was a 2.2 per cent increase in real value added for 2012. The RCS sub-industry accounted for 2.7 per cent of total Gross Domestic Product (GDP) in 2013, the same as in 2012. For the past decade, the RCS share of GDP has remained within the range of 2.2 per cent to 2.7 per cent.

POLICIES AND PROGRAMMES

In keeping with the *Vision 2030 Jamaica – National Development Plan*, several policies, programmes and legislative amendments were pursued during the year to further the development of the RCS sub-industry.

CREATIVE INDUSTRIES

Intellectual Property (IP)

Craft Council of Jamaica

The Craft Council of Jamaica—comprising representatives from local craft traders, producers and other stakeholders—was established during the year to oversee the development of the craft sector and to monitor the quality of items produced and sold as authentic Jamaican craft. The main

objective of the Council is to create the effective governance, operational, technical and infrastructural framework that will strengthen the craft sector and facilitate the sales, promotion and marketing of craft, both locally and internationally. Additionally, the Council has oversight for the formulation of the National Craft Policy which will seek to facilitate the sustainable growth of the craft industry and promote greater local identity of finished craft and souvenirs. It will foster innovation, greater regulation, as well as better production and distribution.

Authentic Jamaica Design Competition for the Craft Industry

Various private and public sector sponsors hosted a design competition for the craft industry from July 2013 to March 2014, aimed at sensitizing the public on the importance of intellectual property. The competition was focused specifically on craft as the Ministry of Tourism and Entertainment (MTE) continued its mission towards the sale of only authentic Jamaican craft items in markets islandwide and the development of channels for craft export. Overall, 118 entries were received, with all entrants registering their items with the Jamaica Intellectual Property Office (JIPO) for protection under the Designs Act 1890. Twelve winners in four categories were awarded cash prizes totalling approximately \$2.0 million dollars in addition to other prizes, such as special low interest loans from the Export Import (EXIM) Bank. The “Authentic Jamaica” trademark was registered with JIPO and is one of the initiatives to be included in the upcoming craft policy.

Intellectual Property & Creative Industries

The Regional Conference on Intellectual Property & Creative Industries was hosted by JIPO and the World Intellectual Property Organization (WIPO) in February 2014 at the University of the West Indies (UWI) Regional Headquarters, Mona. Participating in the three-day conference were regional delegates from Barbados, Belize, Grenada, Haiti, Trinidad and Tobago, and St. Kitts and Nevis as well as members of the public, including creative industry stakeholders. Topics of focus included the Monetizing of IP; the Importance of Creative Industries Policies for the Nation’s

1. Real value added for the RCS sub-industry is reported with a one-year lag.

Economic Growth; Role of IP in Digital Publishing; Gaming and Animation; and Strategies for the Protection of Caribbean Popular Music.

Public Diplomacy Programme

In August, JIPO signed a partnership agreement with the United States of America (USA) government through its embassy in Kingston to carry out a mass-media campaign to sensitize the Jamaican public on the significance and importance of IP protection. It is anticipated that the celebration of Jamaicans' contributions in the creative industries will promote respect for obtaining music legally and authentic trademarked consumer items. The programme will build on past initiatives and is expected to begin implementation in the first half of 2015.

Regional Entrepreneurial Assets Commercialization Hub (REACH)

In July, Jamaica signed a partnership agreement with the Inter-American Development Bank (IDB) to create the Regional Entrepreneurial Asset Commercialization Hub, a virtually housed regional platform that will seek to gather data from innovative firms in the region on IP use and demand. The goal is to create effective strategies to monetize IP assets through the improved commercialization of IP Rights. This would effectively transform intellectual ideas into profitable business models, thereby narrowing the productivity gap of Caribbean entrepreneurs relative to global competitors. Jamaica's assigned priority area on this project is the Creative Industries. This effort will support the overarching CARICOM integration process and create an enabling environment for facilitating intellectual asset management and knowledge transfer.

GDA² Digital Voluntary Copyright Registration System- Pilot Phases and Implementation

JIPO completed the Pilot Phase of this system—which will facilitate voluntary copyright registration in Jamaica—with the Edna Manley College for the Visual & Performing Arts in May 2014 and entered into Pilot Phase agreements with the three Collective Management Organizations (CMOs), namely: the Jamaica Music Society (JAMMS); the Jamaica Association for Composers, Authors & Publishers (JACAP); and the Jamaican Copyright Licensing Agency (JAMCOPY) for further testing. During the pilot, members of the CMOs are allowed to register up to five copyright works free of cost, with full implementation of the registration to follow once amendments to the Copyright Act 1993 are passed in the Houses of Parliament. The development and installation of the software platform, which will be used to facilitate voluntary copyright registration and further technical maintenance and improvements, was completed by WIPO in November 2014.

Legislative Developments

Amendments to the Copyright Act

An amendment to the Copyright Act 1993 to extend the copyright term from 50 years to 95 years is being reviewed. The amendment would allow longer periods for the exploitation of income from works, particularly with the recognition of IP as a form of collateral through the Secured Interest in Personal Property (SIPP) Act 2013.

Amendments to the Trade Marks Act 2001

– Protection of Traditional Knowledge

The process to amend the Trade Marks Act commenced, and is explicitly aimed at protecting the traditional knowledge and cultural expressions of local communities in Jamaica. At present, the traditional knowledge and cultural expressions of local communities are protected by a 2012 JIPO Practice Notice³, which is still being enforced. Under the Practice Notice and the proposed amendment, trademark applications will be examined to ensure that the traditional knowledge and cultural expressions of local communities are not included in trademarks without the prior informed consent of the relevant local community. This is done by reference to Section 11 of the Trade Marks Act which prohibits deceptive, confusing or misleading trademarks, as well as marks which falsely suggest a connection with persons, institutions or beliefs. It is intended that the elements of the Practice Notice will be integrated into the amendments to the Trade Marks Act.

– Protection of Country Name

JIPO has initiated the process of further amending the Trade Marks Act to explicitly protect the country name “Jamaica” from further unauthorised exploitation. This follows the presentation of a Draft Joint Recommendation concerning provisions on the Protection of Country Names by Jamaica to WIPO during the year. The Draft Joint Recommendation seeks to promote consistent and comprehensive treatment and protection of country names among WIPO Member States and is intended to guide IP offices in examining marks which contain or are derived from a country name. The proposed amendment to the Trade Marks Act will protect the country name “Jamaica” against trademarks, business identifiers and domain names which use “Jamaica”, but which do not originate locally.

– Protection of National Emblems and Symbols

Section 12 of the Trade Marks Act prohibits the registration of trademarks which contain national symbols and emblems. During 2014, specific legislation to engender the appropriate use of the National Emblems and Symbols by the public and private sector was pursued. Persons requiring the use of

2. The Gestion de Derechos de (Autor) System – French for Rights Management Copyright.

3. The Practice Notice was issued to provide guidance regarding the consideration and protection of traditional knowledge and traditional cultural expressions in the examination of applications received by JIPO for the registration of trademarks.

any of the National Emblems and Symbols for commercial purposes will be required to obtain prior permission from the Office of the Prime Minister (OPM). The Act was amended in 2013 to allow applicants to apply to the OPM to obtain permission to register a trademark at JIPO using a national symbol or emblem.

– *Protection of Reggae and other authentic Jamaican music forms*

During 2014, JIPO continued to work with the MTE to develop a system of recognition, legal protection and preservation for reggae and other authentic Jamaican music forms. From an IP defensive protection perspective, an interim measure employed during the year was the withholding of exclusive rights in respect of trademarks which use the word “reggae”. Two avenues to protect reggae are currently being explored. One is as intangible cultural heritage through the United Nations Educational, Scientific and Cultural Organization (UNESCO) Convention for the Safeguarding of Intangible Cultural Heritage. The other is the application of collective and certification marks that will be nationally owned by the MTE on behalf of the Government and people of Jamaica. The intention is to enable Jamaican reggae and music producers to get national and international recognition and increased professional opportunities as “authentic Reggae” and/or “Jamaican Reggae” (and other authentic Jamaican music forms), while encouraging others to come on board and meet the defined criteria to be able to use those designations.

Noise Abatement

Amendments to Section 5 of the Noise Abatement Act 1997 were approved, to allow for an extension in the cut-off time for activities described in sub-section (3)⁴ where relevant. This amendment will facilitate the establishment and operation of Parish Extension Committees to review requests for time extensions on permits for entertainment events.

SPORTS

Legislative & Policy Developments

The legislative and policy framework for sport was advanced during the year. In May, the Popular Version of the National Sport Policy was published and disseminated. This followed the tabling of the White Paper on the National Sport Policy in March 2013. Legislative and policy developments achieved during 2014 included:

Strengthening Jamaica’s Anti-Doping Programme

A new Board of Directors was appointed to the Jamaica Anti-Doping Commission (JADCO) in January 2014. In

July, JADCO completed the training of four additional Doping Control Officers (DCOs) at a cost of US\$19 000.00, facilitated by grant funding from UNESCO. This brought the number of DCOs to eight. In September, JADCO launched its website which contains information about the doping control process, banned substances and institutional developments. The website also provides athletes with access to the World Anti-Doping Agency’s (WADA) E-Learning Component⁵, and decisions made by the Anti-Doping Disciplinary Panel and the Appeals Tribunal.

Drafting & Repeal of Anti-Doping in Sport Bill

Cabinet approved the issuance of drafting instructions for the repeal of the Anti-Doping in Sports Act 2008 and the enactment of a new Anti-Doping in Sports Act to align Jamaica’s anti-doping practices with the revised World Anti-Doping Code and the International Standards. The new Act will be effected in January 2015. Consistent with the introduction of the Act, new Anti-Doping Rules will be developed.

Safeguarding and Protecting Children in Sport

Jamaica held its first Stakeholder Forum in October to discuss the development of a policy aimed at the Safeguarding and Protection of Children in Sport, a priority policy area within the sport portfolio. The Directors of Sport from 12 CARICOM Member States, along with representatives from CARICOM, the Organization of Caribbean Administrators of Sport and Physical Education, and the Caribbean Sport and Development Agency have renewed their commitment to this issue along with other countries of the Commonwealth to developing national safeguarding policies and to work toward ensuring that all children in the Caribbean enjoy the benefits of a safe sport experience. A concept paper for the policy and further consultations are expected to be completed in the upcoming financial year to advance the Policy.

Programmes & Activities

The programmes and activities outlined below are linked to the priorities of the National Sport Policy and demonstrate the commitment of the government as it works in partnership with key stakeholders to advance sport development in Jamaica.

Health Benefits for National Athletes

Consistent with the Government of Jamaica’s decision to launch the Jamaica Athletes Insurance Plan (JAIP), the Athlete Development and Well-being Committee of the National Sport Council prepared a proposal for the implementation of the Plan. A study to inform the final benefits and conditions

4. Section 5 (3) of the Act states: “Where any specified equipment is used to provide music for dancing or any other form of entertainment in the vicinity of any hotel, dwelling house or guest house, such activity shall not continue later than 2 o’clock in the morning.”

5. The E-Learning Component is an anti-doping education programme which targets elite athletes.

of the JAIP and to manage the procurement of the services of a health insurance provider was undertaken.

Strengthening Sport-Tourism Linkages

Jamaica Sport, a Technical Working Group established jointly by the MTE and the Ministry of Sport in October will serve as a public/private entity, to explore the commercial opportunities provided by sport tourism and leverage Brand Jamaica at sporting events held locally and internationally. This is to ensure that the country maximizes marketing and promotional opportunities, while attracting additional visitors. Jamaica Sport also oversaw the development of a strategic framework for Sport Tourism and an Investment Procedures manual.

Sports Infrastructure Improvement

– High School Sport Infrastructure Improvement Project (HSSIIP)

Twenty-four high schools have been earmarked for the upgrading of sport physical infrastructure over a two-year period. During the year, needs assessments and consultations were done at 14 of the 24 schools. Initial estimates of expenditure were also completed for upgrading work at seven schools being funded by the European Union Sugar Transformation Project. An irrigation system at Tarrant High School, to support the upgrading of the football field at the institution, was commissioned in September.

– Replacement & Commissioning of the Filters at the National Stadium Pool

A modern filtration system was commissioned at the national stadium pool in March. The cost of acquiring and installing the new filtration system was \$31.4 million, with funding provided by the Sports Development Foundation (SDF).

– Resurfacing of the Mona Hockey Turf

The Mona Hockey Turf was replaced at a cost of approximately \$25.0 million. The project was funded jointly by the SDF, the Olympic Solidarity and corporate sponsors. The Argentinian government, based on an existing bilateral agreement with the Government of Jamaica, facilitated negotiations with an Argentinian company to provide the materials and technical expertise to lay the turf. Work began in August and was completed in September. Consequently, the Jamaica Hockey Federation was able to host the International Hockey Federation's (FIH's) Hockey World League Round One between September 30 and October 5.

– Resurfacing of the Leila Robinson Netball Court

The Leila Robinson Netball Court located at the Independence Park Complex was resurfaced and reopened in August, and now has an International Organization for Standardization (ISO) approved red and blue surface. The work was undertaken by the Sports Development Foundation (SDF) at a cost of \$23.3 million.

– Installation & Commissioning of Flood Lights at the Sabina Park Cricket Complex

New floodlights were commissioned at Sabina Park in August. The lighting project was facilitated by an agreement with the Government of India, which provided a grant of US\$2.1 million. The project, which commenced in April at a cost of US\$3.2 million, also received contributions from the Government of Jamaica and the Tourism Enhancement Fund (TEF).

Beckwith International Leadership Development (BILD) Jamaica – The Sport Leadership and Youth Development Training Project⁶

The BILD Project was officially launched in Three Hills, St. Mary on October 16 and is initially being implemented in St. Catherine and St. Mary, with plans to extend to other parishes over a four-year period. BILD is an international initiative that targets young people deemed unattached and disadvantaged, including the physically challenged, aged 14 to 25 years, in various countries. Seven trainers received advanced training during the year. Additionally, 202 young persons (ages 16–25) were trained as youth sport leaders. These youth leaders have since engaged approximately 1 000 children in organized sport and recreational activities.

International Sport Cooperation

Jamaica signed sport cooperation agreements with South Africa and Cuba in July and November, respectively. The former agreement provides the framework for various Jamaican and South African sport and educational institutions to conduct joint collaborative projects, while the latter is intended to strengthen existing arrangements and expand reciprocal arrangements in sport development.

BROADCASTING

Media Literacy

As part of its ongoing programme of media literacy and digital awareness, the Broadcasting Commission of Jamaica (BCJ) launched the iCreate Series in February.

6. The BILD JAMAICA project commenced in 2013 and is a collaborative effort among the GOJ, international partners, and the private sector to tackle the lack of employment opportunities for unattached youth across Jamaica.

This involves the provision of training in media literacy and digital awareness (inclusive of broadcasting regulations), song writing, music production, content creation, intellectual property and music video production. The series, which took the form of two workshops, iCreate Music and iCreate Video, targeted persons aged 13–21 years and ran for six weeks each in April and November, respectively. The participants in iCreate Music wrote, recorded and produced the song “Raise the Bar”, while the participants in iCreate Video produced a music video for “Raise the Bar” that was fit for broadcast on free-to-air television.

Media Monitoring and Education

In an effort to improve the monitoring capability of the Commission, four additional internal media monitors were recruited during the year. With respect to increasing media awareness in schools, four media clubs were launched at the Balcombe Drive Primary & Junior High and Calabar Primary

& Junior High schools in Kingston, and the Granville All Age and Flankers Primary & Junior High schools in Montego Bay.

PERFORMANCE

REAL VALUE ADDED FOR 2013⁷

Real value added for the RCS sub-industry grew by 0.4 per cent in 2013 (Figure 18A). This followed growth of 2.2 per cent in 2012. The industry accounted for 2.7 per cent of Gross Domestic Product (GDP) in 2013, the same as in 2012 (Figure 18B).

RECREATIONAL, CULTURAL & SPORTS INDICATORS 2014

Creative Industries Investment

During the year, the Creative Industries provided investments valued at \$843.8 million through linkages with a wide cross section of sectors and provided temporary

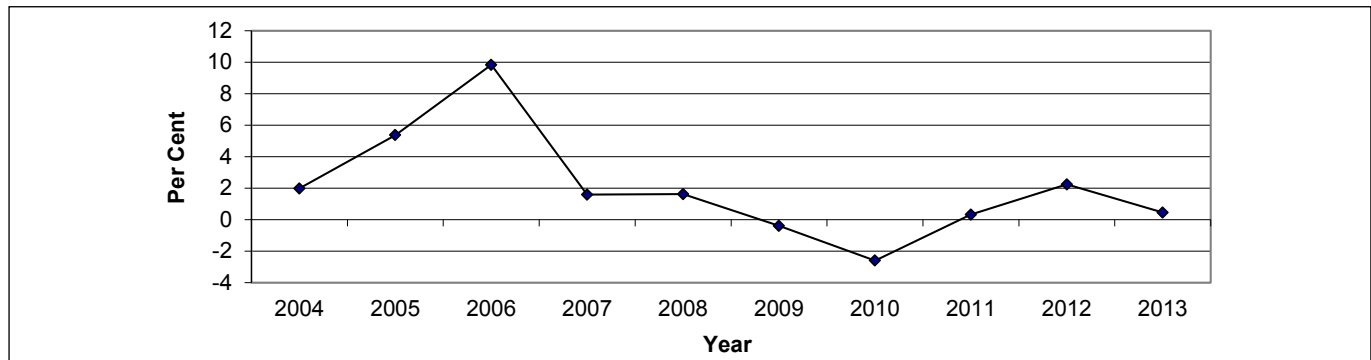


FIGURE 18A: PERCENTAGE CHANGE IN REAL VALUE ADDED FOR RECREATIONAL, CULTURAL AND SPORTING ACTIVITIES, 2004–2013

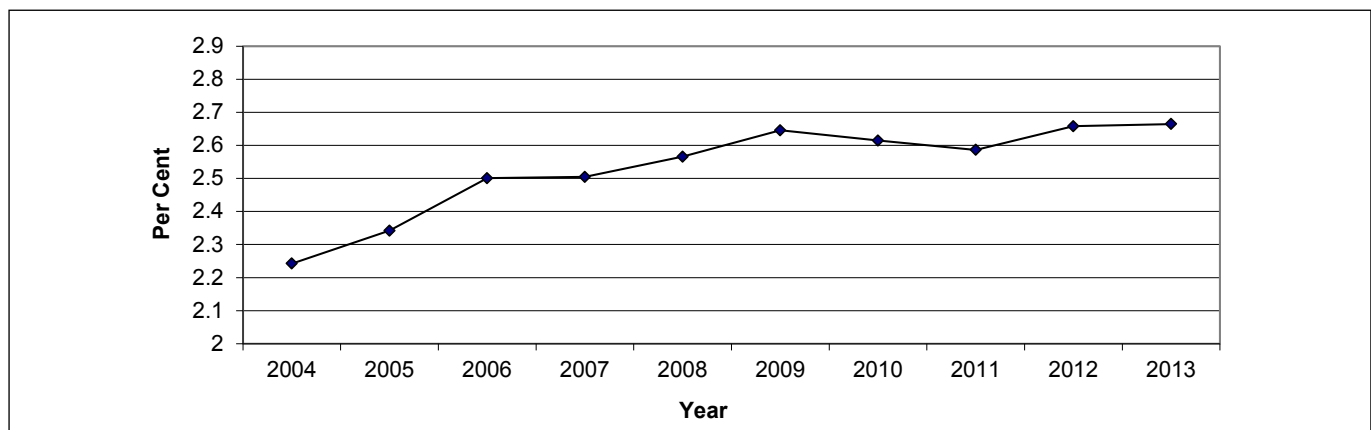


FIGURE 18B: SHARE OF RECREATIONAL, CULTURAL AND SPORTING ACTIVITIES IN REAL GROSS DOMESTIC PRODUCT, 2004–2013

7. Real Value Added for the RCS sub-industry is reported with a one-year lag. The RCS sub-industry accounts for one-third of the Other Services Industry and captures the majority of entertainment activities.

TABLE 18.1
PERCENTAGE CHANGE IN REAL GROSS SALES BY ENTERTAINMENT CATEGORY 2014/2013

Category	% Change
Motion Picture and Video Production and Distribution	-9.7
Radio and Television Activities	3.5
Activities of Authors, Novelists and Playwrights	-45.8
Activities of Art Painters, Cartoonists, Sculptors and other Own Account Artists	-16.7
Activities of Independent Actors, Singers and other Entertainers	38.2
Activities of Night Clubs and Discotheques	-16.0
Activities of Entertainment Centres and the Production of other Types of Entertainment	32.9
TOTAL	6.3

Source: Compiled by the PIOJ from General Consumption Tax Data

TABLE 18.2
PLAYS & DRAMATIC PRODUCTIONS OPENED IN 2013, 2014

2013	2014
2Intents (Smoker 2013)	A Small Room
Alice-The Musical	Absent Friends
Anancy Chaptaz: Winners' Circle	Aladdin
Baby With The Bathwater	An Echo in the Bone
Bang Belly Hotel	Anancy Chaptaz: Monkey Bizniz
Blood Wedding	Blogs & Mirrors (Musical)
Breadfruit is the New Bread, Baby	Caught in the Net
Clues	Clash
Departure in the Dark	Divorce Papers
Eight By Ten	Dream on Monkey Mountain
Imagine	Embassy Saga
In the Red & Brown Water	For My Daughter
Internet Affair	Friends Forever
Jamaica Farewell	Funny Kinda Love
Jonkanoo Jamboree	God Go Wid Yuh
Ladies of the Night	Hamlet
Man Talk	Her Last Cry
My God Don't Wear Pyjamas	If There is a Will, There is a Wife
Osis Abathathu (Tallawah Drama Festival)	Jamaica Sweet
Passa Passa Tun Up	Laff it Off
Risque	Letters for Emancipence
Skoolaz (LTM Pantomime 2012/2013)	Lotto Money
Taboo	Mai Scheme (Smoker 2014)
The Golden Macca Fat (LTM Pantomime 2013/2014)	My God Don't Wear Pyjamas
Thicker Than Water	Princess Boonoonooos
To The Finish	Saving Alligata High
Two Can Play	The Golden Maccafata (LTM Pantomime)
Wine and Roses	Where Is My Father
When the Cat's Away	Wild Alice
The Trouble with the Johnsons!	Miss Elsayda
Brother Scamp and Other Tales (Story Theatre for Young People)	
Embassy Saga	
Cinderella's Chronicles	
Choose to be Free – It's the Year of Jubilee	

Source: Compiled by the PIOJ from Friday editions of the Jamaica Gleaner

employment to 1 787 persons. Of special note is the annual Reggae Sumfest which was held in July, and which generated additional expenditure of \$189.1 million and 290 temporary jobs. Approximately \$250.9 million was expended on projects under the Motion Picture Recognition Status facility in 2014⁸.

Motion Picture, Radio, Television & Other Entertainment Activities

Preliminary General Consumption Tax (GCT) data⁹ for 2014 indicated that gross sales to entertainment categories grew by 6.3 per cent in real terms compared with 2013 (Table 18.1). This reflected increased activities by Independent Actors, Singers and Other Entertainers (up 38.2 per cent); Entertainment Centres and the Production of Other Types of Entertainment (up 32.9 per cent); and Radio and Television Activities (up 3.5 per cent). All other categories recorded lower sales.

Activities of Authors, Novelists and Playwrights

The largest fall-off in gross sales was recorded by the category Authors, Novelists and Playwrights which declined by 45.8 per cent relative to 2013. The number of plays and dramatic productions that opened in 2014 totalled 30 compared with 34 in 2013 (Table 18.2).

Motion Picture Receipts

Revenue earned by the Palace Amusement Company for the 2013/2014 Financial Year¹⁰ amounted to \$1 128.7 million, a reduction of \$45.1 million relative to the previous Financial

Year (Table 18.3). The underperformance of revenue reflected declines in all categories, of which Box Office Receipts and Film Rental recorded the largest absolute declines of \$23.7 million and \$9.2 million, respectively. The fall-off in box office receipts reflected declines at all four cinemas.

Broadcasting

Event Rating Guidelines

Use of the Event Rating Guidelines¹¹ that provide information about the types of content suitable for varying audiences commenced in December. The rating system, established by the MTE in 2013, allows prospective sponsors, patrons and residents to influence or discern the nature of events from the planning stage, and allow sponsors and partners to have a say in activities that can affect their brands, and for residents, the comfort of life in their communities. In using the system, promoters and event organizers indicate a rating of the event in their application to parish councils for Places of Amusement licences. For the month, 116 events were self-rated. Of this amount, 94.0 per cent was rated R; 5.0 per cent rated A18 and 1.0 per cent rated PG 16.

Financial Compliance

The BCJ continued to effect the requirement that Subscriber Television (STV) Operators remit an annual licence fee equal to 5.0 per cent of gross subscription income. Of the 41 STV operators who were active during the year, 36.0 per cent was fully compliant during January to March and 44.0 per cent in April to June. However, there was a reduction in the rate of

TABLE 18.3
SELECTED INDICATORS FROM PALACE AMUSEMENT COMPANY REVENUES, 2013/2014
\$MILLION

	Carib Cinem ^a		Palace Cineplex		Palace Multiplex		Odeon Cineplex ^a		Film Activities		Screen Advertising		Total	
	2012/2013	2013/2014	2012/2013	2013/2014	2012/2013	2013/2014	2012/2013	2013/2014	2012/2013	2013/2014	2012/2013	2013/2014	2012/2013	2013/2014
Box Office Receipts	278.8	265.6	96.6	91.5	128.1	127.1	32.7	28.4					536.2	512.6
Confectionary Sales	113.4	107.2	38.3	36.4	45.7	46.1	12.9	12.0					210.3	201.7
Film Rental									351.9	342.7			351.9	342.7
Screen Advertising	20.1	20.2	8.4	8.1	11.8	11.6	3.4	3.1			26.4	25.9	70.1	68.9
Other Activities	2.9	1.1	1.6	0.9	0.6	0.6	0.3	0.2					5.3	2.9
Total Revenues													1 173.8	1 128.7

a - The Odeon Cineplex was closed in September 2014, as it was deemed to be no longer financially viable by its parent company Palace Amusement.

Discrepancies in table due to rounding

Source: Extract from the 2013/2014 Financial Statements of the Palace Amusement Company

8. It should be noted that this incentive was repealed in December 31, 2013 and benefits grandfathered for those industry players not wishing to participate in the Omnibus suite of incentives.
9. Firms are now classified under the Jamaica Industrial Classification 2005; consequently the categories used in this edition of the ESSJ will differ from the categories used in previous editions of this publication and will not be comparable.
10. The Financial Year for the Palace Amusement Company ends in June.
11. The Guidelines were established in 2013 by the MTE.

full compliance to 35.0 per cent and 33.0 per cent in the third and fourth quarters of the year, respectively. There were 40 STV Operators in 2013, of which an average of 42.3 per cent made full payment, 24.3 per cent made partial payment while 33.5 per cent was non-compliant.

Contacts Made to the BCJ

The Commission received 648 contacts from members of the public in 2014, an increase of 175 relative to 2013. Of the total, 380 complaints were made during January to June and 268 in the latter half of the year (Table 18.4). The most common complaints included operational issues (336), as well as the technical capability (90) and broadcast rights (50) of the sole provider of the 2014 World Cup. Stemming from the complaints made, the BCJ initiated 31 regulatory investigations.

Programming Content Compliance

The BCJ conducted 30 investigations into complaints about the broadcast of problematic content compared with 33 such investigations in 2013. Recurrent complaints were made for the transmission of expletives as well as songs, images and advertisements of a sexually suggestive or explicit nature.

Notices of Breach

The Commission issued 32 Notices of Breaches for the period, 31 fewer than in 2013 (Figure 18 C). Of the total notices issued, 18 of the breaches identified were committed by STV operators, nine by broadcast radio operators and the remainder by broadcast television operators. Eighteen of the notices issued were for contraventions of technical standards, while 14 were for contraventions of content standards.

Amusement Licences

Data collected from the Local Authorities indicated that 24 353 amusement licences were issued during the year, an increase of 1 424 relative to 2013 (Table 18.5). Local Authorities that recorded an increase in the number of licences issued included Trelawny (up 767), Portland (up 693), St. Thomas (up 430) and the Kingston and St. Andrew Corporation (KSAC) {up 300}. Fewer licences were issued by five parish councils including Clarendon (down 768), St. Elizabeth (down 321) and Manchester (down 262).

Revenue collected from the issuance of amusement licences totalled \$103.9 million; \$9.5 million higher than in 2013 (see Table 18.5). The higher revenue reflected increased

TABLE 18.4
NATURE & TOTAL NUMBER OF CONTACTS MADE TO THE BROADCASTING COMMISSION 2013, 2014

	2014		Total
	Jan-June	July-Dec	
Licences Application Process	24	13	37
Other Operational Issues	186	150	336
Zoning and contact information for STV	11	12	23
Complaints received and investigated	18	22	40
Digital converter box issues	19	2	21
Exclusive rights issues	33		33
Logic One's unauthorized STV operation in Lawrence Tavern	3		3
CVM Television Limited's Technical Capability and the implications for coverage of the World Cup	86	4	90
Matters Concerning CVM's Exclusive Broadcast Rights		50	50
Columbus Communications Limited's (Flow) removal of overseas channels in compliance with copyright law		10	10
Availability of rebate to aggrieved subscriber television users		2	2
Commission's role in regulating fees charged by STVO's		3	3
Total	380	268	648
	2013		Total
	Jan-June	July-Dec	
Complaints received and investigated	30	27	57
Difficulty accessing BBC		6	6
Digital Switchover/Digital Cable Box Issues		13	13
Exclusive broadcast rights issues		39	39
Flow's removal of the fox movie channel		2	2
Information about audience share for the broadcast media		3	3
Information Requested	86	68	154
Licences Application Process	9	18	27
Other operational issues	77	68	145
Poor reception from Stars Cable	10	7	17
STV Licensees pegging subscriber fee to the value of the United States Dollar	2		2
STV loss of service – redress		3	3
Zoning and Contact Information for STV	5		5
Total	219	254	473

Source: Broadcasting Commission of Jamaica

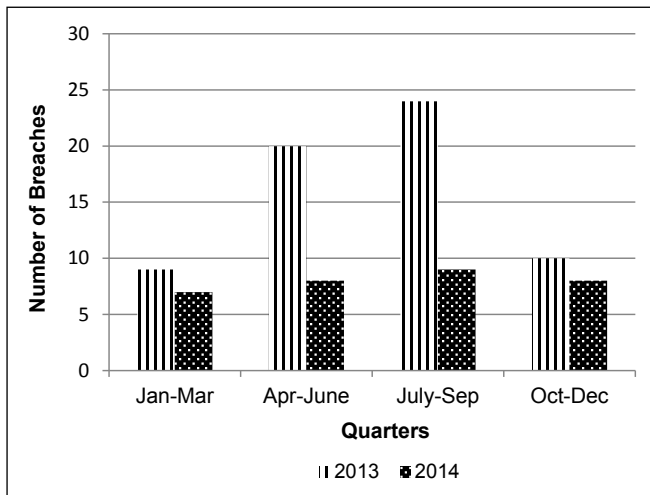


FIGURE 18C: NOTICES OF BREACH ISSUED TO LICENCE OPERATORS BY THE BCJ, 2013–2014

collection from all but three local authorities. The parish councils recording the largest absolute increases included the KSAC (up \$3.0 million), St. Thomas (up \$2.9 million), St. Mary (up \$1.2 million), and Hanover (up \$1.1 million). The lower receipts were recorded for Manchester (down \$0.6

million), Westmoreland (down \$1.7 million), and Trelawny (down \$0.1 million).

Collective Management¹² Organizations

*Jamaica Association of Composers, Authors and Publishers (JACAP)*¹³

Total disbursements from royalties collected by JACAP on behalf of its members amounted to \$14.7 million, \$1.1 million higher than the amount paid out in 2013 (Table 18.6). This increase reflected higher local royalty distribution, which grew by \$3.3 million. Royalty distribution to members overseas fell by \$2.2 million. Overseas royalties (net) collected in 2014 by JACAP on behalf of its members amounted to \$7.1 million, a decline of \$6.4 million relative to 2013. At the end of 2014, JACAP's membership was 3 397 persons relative to 3 192¹⁴ persons in 2013.

*Jamaica Music Society (JAMMS)*¹⁵

A total of \$20.3 million was collected locally in permit fees from entities which used music protected by JAMMS licences relative to a total of \$21.1 million collected in 2013. Income from permits issued for Events accounted for the majority (77.0 per cent) of the total fees collected by JAMMS from music users. Further disaggregation is provided in Figure 18D.

**TABLE 18.5
AMUSEMENT LICENCES GRANTED & REVENUE COLLECTED 2010–2014**

	LICENCES ISSUED					REVENUE COLLECTED '000				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Clarendon	1 536	1 592	2 134	3 683	2 915	3 395.0	4 722.4	4 866.8	5 162.6	5 635.2
KSAC	2 229	5 817	6 487	6 720	7 020	15 203.6	23 410.0	27 424.3	30 737.1	33 784.0
Manchester	919	432	152	796	534	2 298.0	1 080.0	361.0	3 014.8	2 445.5
St. Elizabeth	2 001	2 279	2 625	2 547	2 226	7 658.5	8 667.3	9 307.8	9 787.4	10 502.1
Hanover	247	222	109	355	689	940.3	1 189.5	1 003.5	1 160.5	2 248.0
St. Catherine	845	1 336	2 158	1 952	1 953	3 022.4	4 732.2	8 328.6	7 468.8	8 137.0
St. Thomas	1 430	1 530	1 419	1 326	1 756	4 048.0	4 711.9	4 008.3	4 774.9	7 680.7
Westmoreland	1 158	454	860	1 034	866	8 440.4	4 334.4	6 883.6	7 731.8	6 022.5
Trelawny	588	741	836	733	1 500	1 697.5	2 211.8	2 506.5	2 611.0	2 473.7
Portland	340	548	439	861	1 554	2 246.6	2 953.0	2 663.7	5 127.1	5 324.7
St. Ann	581	645	893	793	825	3 391.5	4 089.6	6 724.8	6 519.5	6 669.5
St. Mary	1 059	1 414	1 712	793	1 072	2 933.9	8 325.7	5 820.1	3 186.0	4 411.1
St. James	795	778	624	899	1 071	3 094.3	3 502.4	3 188.4	4 583.3	5 612.1
Portmore	278	331	396	437	372	910.0	1 194.0	1 547.0	2 497.7	2 950.4
TOTAL	14 006	18 119	20 844	22 929	24 353	59 280.0	75 124.2	84 634.1	94 362.4	103 896.3

Source: Compiled by the PIOJ with data received from the Local Authorities

12. Collective management is the exercise of copyright and related rights by organizations acting in the interest and on behalf of the owners of rights.
13. 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.
14. The membership figure for 2013 was revised.
15. JAMMS' primary objectives are to administer rights on behalf of Record Companies and Record Producers who own the copyright in recorded music and to ensure that all music users engaged in "playing music publicly" or broadcasting music, are duly authorized, by obtaining the relevant Licence/Permit.

TABLE 18.6
PAYMENT OF ROYALTIES DISBURSED BY JACAP, 2013–2014
SMILLION

Total Monies Disbursed by JACAP	2013	2014 ^p	2014/2013	
			Abs Change	% Change
Local Distribution	2.6	5.9	3.3	127.3
Overseas Distribution (Gross)	11.0	8.8	-2.2	-20.1
Total	13.6	14.7	1.1	8.0
Incoming Royalties to JACAP				
Overseas Net	13.4	7.1	-6.4	-47.3

p - preliminary

Source: Jamaica Association of Composers, Authors and Publishers

Receipts from overseas royalty payments were \$4.1 million, an increase of \$1.9 million compared with 2013. Total royalty pay-outs by JAMMS to its membership increased by \$10.0 million to \$23.5 million. Of this amount, local and overseas royalty pay-outs accounted for 59.0 per cent and 41.0 per cent, respectively.

Financing to the Entertainment Industry

The total stock of Loans and Advances made available for entertainment purposes amounted to \$2 182.2 million, an increase of 3.8 per cent relative to 2013 (Figure 18E). The increase in disbursements reflected higher loans by Commercial Banks, which grew by 4.2 per cent to \$2 130.8 million. In contrast, loans by FIA Institutions declined by 10.9 per cent to \$51.4 million. In real terms, loans from Commercial Banks and FIA Institutions for entertainment purposes declined by 2.1 per cent and 16.2 per cent, respectively.

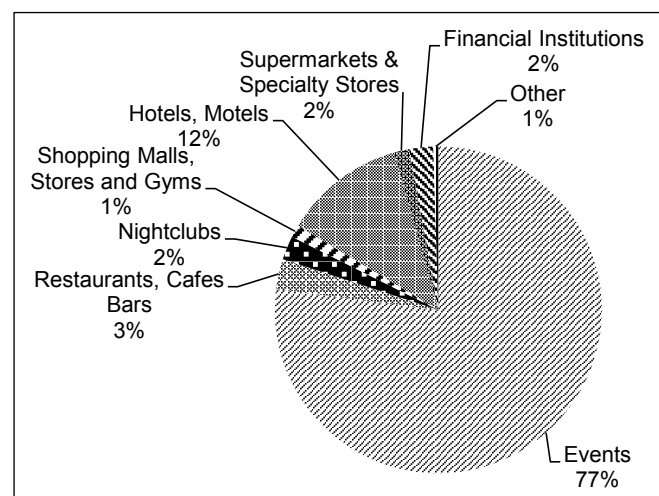


FIGURE 18D: FEES COLLECTED FROM LICENCES/ PERMITS ISSUED BY JAMMS IN 2014

SPORTING & OTHER RECREATIONAL ACTIVITIES

Government Funding to Sporting Activities

Total income for the Sports Development Foundation (SDF) amounted to \$598.8 million, an increase of \$17.7 million compared with the previous year. The higher income emanated from increased receipts of \$18.9 million in contributions from the Culture Health Arts Sports and Education (CHASE) Fund¹⁶, which outweighed the declines recorded by the other income categories.

Total expenditure by the SDF for the year was \$520.9 million compared with \$509.3 million in 2013. The majority of expenditure was for Infrastructure Projects which totalled \$166.4 million, an increase of \$27.5 million relative to 2013 (Table 18.7). The projects undertaken by the SDF during the year included:

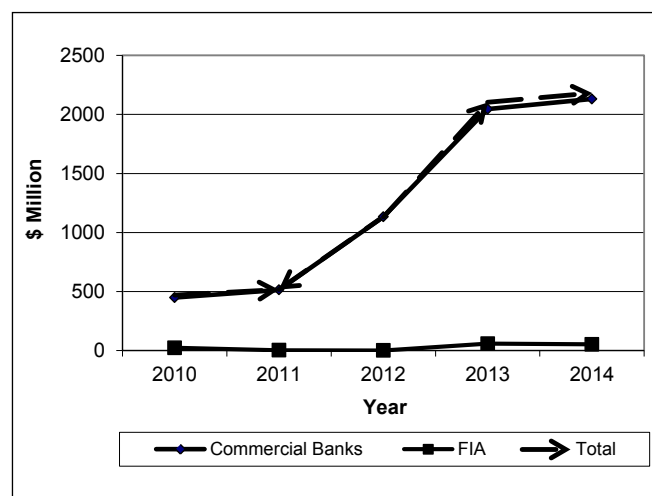


FIGURE 18E: STOCK OF LOANS AND ADVANCES TO THE ENTERTAINMENT INDUSTRY, 2010–2014

16. The CHASE Fund receives a cess imposed on the gaming industry by the Government of Jamaica. Based on Section 59G of the Betting, Gaming and Lotteries Act 2002, 40.0 per cent of this cess is allocated to the Sports Development Foundation.

TABLE 18.7
PROJECTS FUNDED BY SDF 2010–2014
\$MILLION

Expenditure on Projects	2010	2011	2012	2013	2014	2014/2013	
						Absolute Change	% Change
Courts	14.7	20.3	10.6	33.3	27.1	22.6	-18.6
Fields	27.0	6.9	11.2	17.3	47.5	6.2	174.0
Fences/Walls	15.9	2.3	4.0	1.8	13.7	-2.2	661.8
Clubhouses, Complexes & Lighting	30.2	10.2	1.4	6.5	3.1	5.1	-52.2
Equipment, Signs & Other Projects	1.0	2.1	2.0	1.4	0.7	-0.5	-51.6
Running Tracks	0.0	109.5	15.0	0.0	0.0	-15.0	n/a
Filters & Fittings	0.0	0.0	0.0	11.4	0.0	11.4	-100.0
National Projects	0.0	0.0	0.0	0.0	74.4	74.4	n/a
TOTAL	88.8	151.3	44.1	71.7	166.4	27.5	132.1
Number of Projects	2010	2011	2012	2013	2014		
Courts	15	8	4	5	16		
Fields	11	2	3	2	6		
Fences/Walls	18	2	3	5	10		
Clubhouses, Complexes, Lighting	13	4	1	3	3		
Signs & Equipment	4	2	0	0	0		
Running Tracks	0	3	2	0	0		
Filters & Fittings	0	0	0	1	0		
National Projects	0	0	0	0	6		
TOTAL	64	21	13	16	41		

Source: Sports Development Foundation Limited

- the construction of multipurpose courts at 16 locations, including four schools, amounting to \$27.1 million
- fencing at 10 sites in six parishes amounting to \$13.7 million
- the rehabilitation of playfields at four locations, including three schools, amounting to \$47.5 million
- rehabilitation/commencement of construction of clubhouses, costing \$3.1 million
- national projects amounting to \$74.4 million
- provision of equipment islandwide which amounted to \$0.7 million.

Allocations to National Associations and Government Agencies totalled \$207.7 million, a reduction of \$85.9 million relative to 2013, which reflected lower disbursements to the Associations. Grants to Government Agencies increased relative to 2013 (Table 18.8).

Allocations to National Associations amounted to \$159.1 million compared with \$247.8 million in 2013. This reduction was due to a decline in grants to 17 entities. Grants disbursed to Government Agencies totalled \$48.6 million relative to \$45.9 million in 2013. The increase reflected a higher disbursement to Independence Park Limited, which received \$16.5 million compared with \$3.7 million in 2013. GC Foster College and the Social Development Commission received disbursements of \$8.8 million and \$17.0 million, respectively, the same allocations received in 2013. The Institute of Sport was the only government agency receiving a lower disbursement,

with an allocation of \$6.3 million, a decline of \$10.1 million compared with 2013 (see Table 18.8).

Netball

The national netball team hosted one international tournament in 2014, one fewer than in 2013. Expenditure associated with the hosting of the tournament against Barbados amounted to \$0.7 million, while gate receipts generated was \$0.3 million. Approximately 300 patrons attended the match.

The national team embarked on four overseas tours compared with two in 2013. These were the tri-nation series in England (senior team) in January; the Jean Pierre Caribbean Youth tournament in Antigua in April; the Commonwealth Games in Scotland in July; and the Fast5 World Series in New Zealand (senior team) in November. Expenditure associated with the teams' overseas competitions amounted to \$8.1 million, which was \$1.8 million lower than the cost to facilitate overseas tours in 2013.

A total of 656 local league games were held compared with 700 in 2013. Gate receipts associated with these games amounted to \$0.5 million, which was below the associated expenditure of \$10.0 million. This compared with gate receipts and expenditure of \$0.3 million and \$6.5 million, respectively in 2013. Approximately 1 500 patrons attended these matches, 100 more than the number of persons who supported netball at the local league level in 2013.

To assist with their operations, Netball Jamaica received sponsorships (cash and non-cash) and donations valuing \$41.0 million in 2014, which was \$1.1 million higher than the total value of sponsorships received in 2013.

TABLE 18.8
SPORTS DEVELOPMENT FOUNDATION DISTRIBUTION OF GRANTS, 2013–2014
\$MILLION

ASSOCIATIONS	2013	2014	2014/2013	
			Abs. Change	% Change
Amateur Swimming Association	2.4	1.8	-0.6	-24.8
Association of Sports Medicine	1.0	1.0	0.0	0.0
Equestrian Federation	0.6	1.3	0.7	112.3
IAAF High Performance Centre	1.0	0.0	-1.0	-100.0
Jamaica Athletic Administrative Association	18.7	19.7	1.1	5.7
Jamaica Amateur Basketball Association	4.5	5.0	0.5	11.2
Jamaica Amateur Bodybuilding Association	0.8	1.1	0.3	37.5
Jamaica Amateur Gymnastics Association	0.0	0.1	0.1	n/a
Jamaica Amateur Softball Association	0.0	0.0	0.0	n/a
Jamaica Badminton Association	4.4	5.3	0.9	21.2
Jamaica Bobsleigh Federation	0.8	0.0	-0.8	-100.0
Jamaica Boxing Board of Control	2.0	1.8	-0.2	-11.3
Jamaica Chess Federation	3.5	2.8	-0.7	-21.4
Jamaica Cricket Association	14.6	19.4	4.8	32.5
Jamaica Cricket Umpires Association	0.0	0.0	n/a	n/a
Jamaica Cycling Federation	2.7	1.8	-0.9	-32.5
Jamaica Deaf Sports Association	1.3	1.3	0.0	0.0
Jamaica Football Federation	137.5	45.0	-92.5	-67.3
Jamaica Golf Association	1.9	2.4	0.5	25.8
Jamaica Hockey Federation	2.8	3.5	0.6	22.8
Jamaica Intercollegiate Sports Association	2.8	0.8	-2.0	-71.4
Jamaica Netball Association	11.2	11.2	0.0	0.4
Jamaica Paralympic Association	2.0	2.0	0.0	0.0
Jamaica Motoring Club	0.5	0.0	-0.5	-100.0
Jamaica Rifle Association	0.5	0.0	-0.5	-100.0
Jamaica Rugby League	1.6	1.9	0.4	24.2
Jamaica Rugby Union	2.4	1.6	-0.8	-33.5
Jamaica Seido Karate Association	0.8	0.8	-0.1	-6.3
Jamaica Skeet Club	0.0	0.5	0.5	n/a
Jamaica Ski Federation	0.0	0.0	0.0	n/a
Jamaica Squash Association	1.8	1.8	0.0	0.0
Jamaica Surfing Association	1.5	2.0	0.5	33.3
Jamaica Table Tennis Association	4.7	3.1	-1.5	-32.6
Jamaica Triathlon Association	0.3	0.0	-0.3	-100.0
Jamaica Visually Impaired Cricket Association	0.0	2.9	2.9	n/a
Jamaica Volleyball Association	3.0	4.9	1.9	64.3
Multicare Foundation	2.8	2.8	0.0	0.0
National Domino Bodies	0.0	0.9	0.9	n/a
Special Olympics of Jamaica	5.5	3.5	-2.0	-36.3
Tae-Kwon Do Association & Federation	1.4	0.8	-0.6	-42.9
Tennis Jamaica	4.5	4.3	-0.2	-4.4
Total National Associations	247.8	159.1	-88.6	-35.8
GOVERNMENT AGENCIES				
G.C. Foster College	8.8	8.8	0.0	0.0
Independence Park Limited	3.7	16.5	12.8	343.5
Institute of Sport	16.5	6.3	-10.1	-61.5
Social Development Commission	17.0	17.0	0.0	0.0
Total Government Agencies	45.9	48.6	2.7	5.8
TOTAL DISBURSEMENTS (ASSOCIATIONS & GOVERNMENT)	293.7	207.7	-85.9	-29.3

Source: Sports Development Foundation Limited

Cricket

For 2014, the Jamaica Cricket Association received \$59.5 million in sponsorships relative to \$60.6 million in 2013, which facilitated the organization's thrust to broaden the reach of the sport throughout the year. The sponsorships received facilitated the hosting of eight local tournaments and

programmes, as well as two regional and two international matches. Approximately 30 000 patrons supported cricket related events during the year.

Track and Field

The Jamaica Athletics Administrative Association (JAAA) received gross income of \$189.1 million for the 2013/2014

Financial Year¹⁷, an increase of \$32.1 million relative to the previous financial year (Table 18.9). The highest inflows received were from Gear Sponsor (up \$36.2 million) and the SDF (up \$7.2 million), which combined accounted for 83.7 per cent of total income. However, declines were recorded for the categories Other Sponsors (down \$12.5 million), Gate/ Programme Receipts (down \$6.3 million), and Broadcast Rights (down \$1.1 million).

An uptick of \$0.1 million to US\$167.6 million in expenditure was recorded by the JAAA for the 2013/2014 Financial Year (Table 18.10). Higher expenditure was recorded for seven categories. Combined, spending on Competitions and Other Expenses accounted for 62.4 per cent of total expenditure. A decline of \$15.5 million in expenditure on Team Gear represented the highest absolute fall in spending relative to the previous financial year.

Competition-related expenditure amounted to \$83.5 million for 2013/2014, an increase of \$15.3 million compared with 2012/2013. This expenditure facilitated the participation of Jamaican athletes at:

- the CARIFTA Games, amassing 89 medals – 42 gold, 34 silver and 13 bronze, Jamaica’s best showing at the event
- the inaugural World Relays at which Jamaica placed second with one silver and two gold medals
- the Commonwealth Games, obtaining 19 medals (10 gold, 3 silver and 6 bronze), the country’s best medal tally to date.

Football

Efforts to restructure football in Jamaica continued in 2014 with the development of a four-year strategic transformation

plan to, inter alia, significantly improve the senior men’s and women’s ranking by 2018. The main strategic initiatives include the establishment of a National Premier League franchise, with 10 franchises allocated on an equitable basis islandwide. In keeping with this objective, a Franchise Committee was established to pilot the transition.

During the year, training activities geared towards strengthening the quality of officials in the sport continued. Specific courses provided during the year included:

- FIFA Futuro III Referees Course, which provided training for 30 referees from the Caribbean, USA and Canada
- Local Referee Course, which had 30 local participants facilitated by an overseas instructor
- Four local coaching courses, which imparted knowledge to 106 participants
- Three FIFA coaching courses, which had a total of 72 participants.

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.

A total of 241 match referees were registered during 2014 by the JFF’s licensing committee. This compares with 244 in 2013. Of the total number of referees registered in 2014, 44 were female.

TABLE 18.9
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION INCOME, 2009/2010 TO 2013/2014
JS ‘000

Income	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2013/2014/ 2012/2013	
						Absolute Change	% Change
Gear Sponsor	5 3976.3	51 484.1	59 755.5	98 477.3	134 633.5	36 156.2	36.7
IAAF/NACAC Grants	2 331.5	0.0	771.3	0.0	1 060.9	1 060.9	n/a
SDF Grant	12 896.4	11 700.0	18 266.2	16 431.5	23 654.2	7 222.7	44.0
JOA Grant	1 342.7	102.7	0.0	0.0	0.0	n/a	n/a
Other Sponsors	16 114.0	17 453.2	32 612.9	27 399.1	14 950.0	-12 449.1	-45.4
Gate / Programme Receipts	2 110.6	11 862.9	24 246.4	9 074.3	2 775.6	-6 298.7	-69.4
Broadcast Rights	0.0	2 420.0	537.3	1 300.0	200.0	-1 100.0	-84.6
Returns from meets	0.0	230.2	813.5	2 461.8	3 360.2	898.4	36.5
Other Income	6 372.1	1 064.1	3 095.9	1 892.6	8 515.3	6 622.7	349.9
Total Income	95 143.6	96 317.2	140 099.0	157 036.6	189 149.7	32 113.1	20.4

Source: Extract from the Annual Report of the Jamaica Athletics Administrative Association

17. The JAAA’s Financial Year begins on October 1 and ends on September 30.

TABLE 18.10
JAMAICA ATHLETICS ADMINISTRATIVE ASSOCIATION EXPENDITURE, 2009/2010 TO 2013/2014
JS'000

Expenditure	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2013/2014/ 2012/2013	
						Absolute Change	% Change
Athletes Assistance	5 502.2	4 797.1	5 490.8	9 096.4	6 033.4	-3 063.1	-33.7
National Championships	11 387.9	12 895.1	27 059.0	27 250.0	24 906.2	-2 343.9	-8.6
Secretariat Office	5 001.7	4 567.4	5 987.6	7 616.8	7 981.4	364.6	4.8
Competitions:							
Local	15 713.4	9 128.8	6 376.7	3 884.8	12 702.5	8 817.7	227.0
Regional	24 671.2	11 878.8	24 104.1	28 710.5	33 112.4	4 401.9	15.3
International	15 072.6	37 814.9	14 153.6	34 877.5	35 629.1	751.6	2.2
Cross Country-NACAC	1 906.9	604.7	820.6	629.1	2 025.1	1 396.0	221.9
London Olympics	0.0	0.0	833.0	18.0	0.0	-18.0	-100.0
Camps	511.0	499.5	0.0	0.0	0.0	n/a	n/a
Seminars / Training	763.2	584.1	279.6	723.0	798.4	75.4	10.4
Other Expenses	11 318.6	8 934.1	12 262.5	15 708.1	21 047.9	5 339.8	34.0
Puma Team Gear (Competition & Training)	0.0	0.0	10 000.0	38 100.0	22 596.8	-15 503.2	-40.7
JAAA Special Project	270.1	779.1	918.6	895.3	763.0	-132.2	-14.8
Total Expenditure	92 118.8	92 483.6	108 286.1	167 509.5	167 596.2	86.7	0.1

Source: Extracted from the Annual Report of the Jamaica Athletics Administrative Association

National Premier League

The 2013–2014 Premier League commenced in September 2013 and ended in May 2014. During the season, 230 games were played among 12 clubs and 600 players, the same as in the 2012/2013 season. The season saw the return of the Top 4 (play-offs) format after eight seasons of the league format. Montego Bay United Football Club won the title. Teams promoted were August Town Football Club and Rivoli United.

OUTLOOK

The Other Services Industry—of which the RCS sub-industry accounts for the majority—is expected to record growth in real value added in 2015. Specific initiatives slated to commence during the year, which are expected to positively impact the development of the sub-industry, include:

New Construction of the Running Track and Infield at GC Foster College of Physical Education & Sport

The GC Foster College of Physical Education and Sport will benefit in 2014/15 from the resurfacing of its running track. It is anticipated that the track will be completed within 24 weeks after commencement. The project is expected to be funded by the Sport Development Foundation at a cost of US\$1.5 million.

Continuation of the High School Sport Infrastructure Improvement Project (HSSIIP)

Both the Tarrant and the Calabar High School fields are scheduled to be completed in January 2015. Another 12

projects are at various stages of development, from contract tendering and signing to commencement of technical works. Ninety million has been allocated for the HSSIIP to significantly advance or complete those projects in 2015.

Installation of an Electrical System at the National Stadium Pool

The installation of an electrical system at the National Stadium Pool, initially slated for 2014, was delayed, and is anticipated to be completed in 2015. A total of \$45.0 million has been allocated by the Sports Development Foundation (SDF) for this project.

Anti-Doping Legislation

It is anticipated that the drafting of new rules to govern the Independent Anti-Doping Disciplinary Panel and the Anti-Doping Appeal Tribunal will be completed in February 2015. A review of the Anti-Doping in Sport Policy (2005) is also expected to be completed before the end of Fiscal Year 2014/15.

Institution of Coaching Standards for Netball

It is anticipated that the quality of Netball in Jamaica will be raised with the instituting of a December 2015 deadline by Netball Jamaica for all coaches to obtain Level 1 or GC Foster College certification. This requirement will apply to all persons who wish to coach teams participating in competitions under the auspices of the Inter-Secondary Schools Sports Association (ISSA) and Netball Jamaica. ■



WHOLESALE & RETAIL TRADE; INSTALLATION AND REPAIR OF MACHINERY

INTRODUCTION

Real value added for the Wholesale & Retail Trade; Repair and Installation of Machinery industry (WRTRIM) increased by 0.2 per cent and contributed 17.6 per cent to overall Gross Domestic Product (Figure 19A). Growth was facilitated by:

- a real increase in the stock of Loans & Advances to distributors and consumers
- higher volume (7.8 per cent) and a real increase in the value (5.2 per cent) of Automated Banking Machine (ABM) and Point of Sale (POS) transactions.

The improvement in real value added was also supported by:

- a 6.6 per cent real increase in remittance inflows
- a 23.0 per cent increase in the average Business Confidence Index – contributing to this out-turn was

better return on investments and expectations of an improvement in the economy compared with 2013

- an 8.5 per cent increase in the average Consumer Confidence Index – resulting from consumers’ assumption that economic conditions had improved as well as the expectation of better job prospects and higher income
- an increase in the average employed labour force of 19 125 persons.

Growth occurred despite a weak domestic economy, a decrease in merchandise imports and constrained government spending stemming from fiscal austerity measures.

Improvement in domestic demand was brought about by increased gross sales, which also aided the industry’s growth.

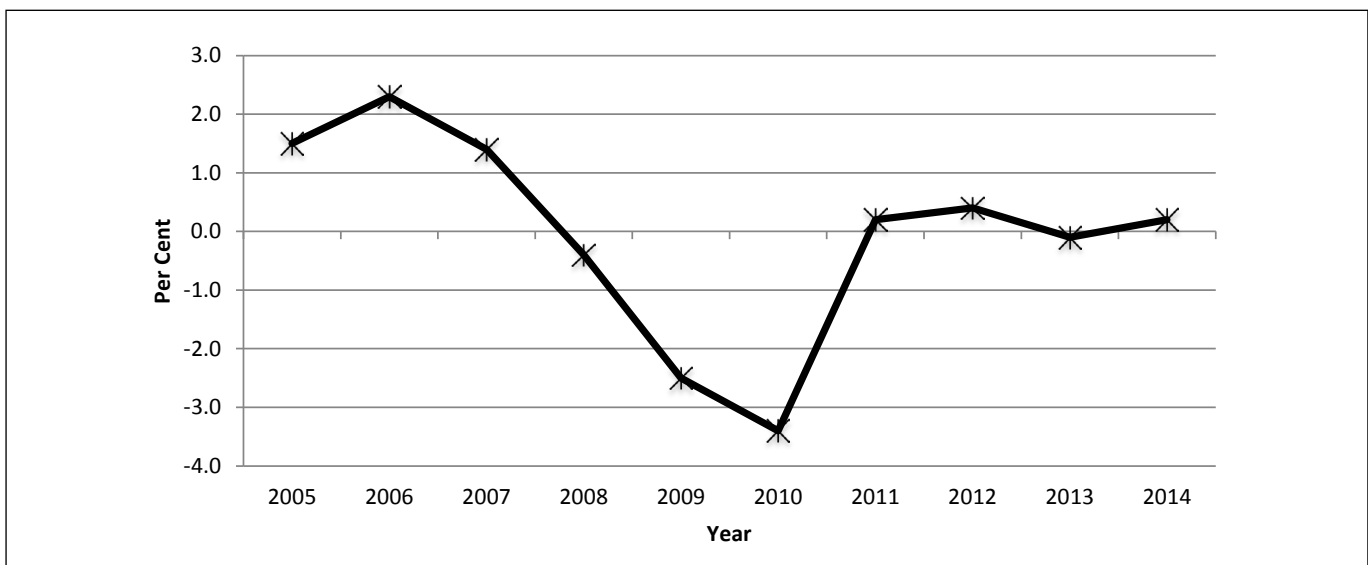


FIGURE 19A: REAL VALUE ADDED GROWTH RATES OF WHOLESALE & RETAIL TRADE; REPAIR AND INSTALLATION OF MACHINERY INDUSTRY, 2005-2014

Analysis of preliminary¹ General Consumption Tax (GCT) data revealed that three of the eight goods categories recorded higher sales compared with 2013. The categories Wholesale & Repair of Household Goods (up 8.0 per cent); Hardware, Building Supplies, Electrical Goods & Machinery (up 2.6 per cent) and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores (up 1.5 per cent) recorded growth for the period. Combined, the three categories accounted for 42.5 per cent of total sales (Table 19.4).

POLICIES, REGULATIONS AND PROGRAMMES

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). Primary regulations governing the industry are the:

- Fair Competition Act 1993
- Copyright Act 1993
- Trademarks Act 2001
- Protection of Geographical Indications Act 2009.

The Bankruptcy and Insolvency Act will take effect at the start of 2015 and seeks to consolidate the laws relating to bankruptcy, insolvency, receiverships, and provisional supervision and repeals to the Bankruptcy Act 1880. The Act aims to create an environment that supports the rehabilitation of debtors and preservation of viable companies thus reducing business failures, preserving employment and supporting growth.

Other initiatives that supported the operations of the WRTRIM industry include the Mobile Business Clinic Initiative (MBCI), which commenced in November 2014 and is an islandwide intervention involving decentralization of business development services. The initiative also includes the enhancement of business advisory services and the financing of Micro Small & Medium Enterprises (MSME) operations. WRTRIM accounts for approximately 46.3 per cent of MSME entities that will benefit from the successful implementation of this initiative.

The industry was also supported by measures aimed at expediting the development of the Special Economic Zones (SEZs) in Jamaica as a critical component of the Global Logistics Hub Initiative. The WRTRIM industry is expected to benefit from the SEZs through the distribution and consumption of goods and services.

Fair Trading Commission (FTC)

The FTC which is governed and empowered by the Fair Competition Act 1993 (FCA) carried out investigations in relation to the conduct of businesses and compliance with the FCA. For 2014, the FTC received 142 complaints relative to 254 the previous year (Table 19.1). Of this total, the majority was for the breach Misleading Advertising (122) followed by breaches Not Under the Act (8) and Offences against Competition (7). The Automobile sector accounted for 27.5 per cent of total complaints received, followed by Telecommunications (26.1 per cent) and Education; Financial Services; and Household Appliances & Accessories each at 4.9 per cent.

TABLE 19.1
CASES INVESTIGATED AND COMPLETED BY THE FTC, 2013-2014

BREACH/INVESTIGATION	2013 ^r			2014		
	RECEIVED	INVESTIGATED	CLOSED	RECEIVED	INVESTIGATED	CLOSED
Abuse of a Dominant Position	5	8	4	0	4	1
Agreements That Substantially Lessen Competition	3	3	0	0	3	1
Double Ticketing	1	1	1	0	0	0
Misleading Advertising	199	330	132	122	320	106
Misleading Advertising/ Offences Against Competition	3	3	0	1	4	1
Misleading Advertising/ Sale Above Advertised Price	3	3	3	1	1	1
Not Under the Act	24	31	26	8	13	8
Offences Against Competition	3	24	4	7	26	6
Price Fixing	0	1	1	0	0	0
Request For Opinion	10	11	7	3	7	5
Sale Above Advertised Price	2	2	0	0	2	0
Tied Selling	1	1	0	0	1	0
TOTAL	254	418	178	142	381	129

r - revised

“Breach types were reclassified by the Fair Trading Commission; consequently the categories will differ from previous editions of this publication.”

Source: Fair Trading Commission

1. GCT data used are preliminary and does not include all filings.

TABLE 19.2
CONSUMER AFFAIRS COMMISSION PERFORMANCE INDICATORS, 2012-2014

	2012	2013	2014	Percentage Change 2014/2013
Complaints Received	1 833	1 584	1 584	0.0
Complaints Settled	1 606	1 345	1 365	1.5
Consumer Advice	1 377	789	724	-8.2
Monies Secured (\$M)	11.6	26.8	43.1	60.8
Surveys	41	30	30	-3.3

Source: Consumer Affairs Commission

There were 381 cases investigated for the year, a decrease of 8.9 per cent compared with 2013. Of this total, 320 were for Misleading Advertising while there were 26 investigations for Offences against Competition and 13 investigations for breaches Not Under the Act. The largest number of cases investigated was in the Automobile sector (133 cases) followed by Telecommunications (92 cases) and Education (19 cases).

Of the cases investigated, 129 were closed, 49 fewer than in 2013. A total of 106 Misleading Advertisement breaches were closed in addition to 8 cases Not Under the Act. The sectors with the most closed cases were:

- Automobile – 32 cases
- Telecommunications – 28 cases
- Financial services – 10 cases
- Insurance – 7 cases.

Consumer Affairs Commission (CAC)

The CAC monitors prices of consumer goods by conducting scheduled and impromptu surveys in accordance with their mandate to inform, educate and empower consumers in the marketplace. The surveys carried out totalled 30 (same in 2013) and included:

- petroleum – 13 surveys
- grocery – 12 surveys.

In addition, one survey each was conducted for school textbook, banking, hardware, back-to-school expenses and customer service duty.

The CAC received 1 584 complaints for 2014 (the same as 2013) of which 1 365 were settled compared with 1 345 in 2013 (Table 19.2). Of the complaints received, 30.6 per cent was related to Electrical Equipment & Appliances, while 12.3 per cent was for Motor Vehicles & Parts and 11.5 per cent against Utilities (Figure 19B).

A total of 724 individuals sought advice from the CAC, 65 fewer than the previous year. Compensation for aggrieved consumers totalled approximately \$43.1 million, an increase of 60.8 per cent compared with 2013.

Bureau of Standards Jamaica (BSJ)

The BSJ is empowered by the Standards Act 1969, Weights & Measures Act 1976 and the Processed Food Act 1959, to carry out regulatory functions in compliance with these Acts. One of the main programmes undertaken by the BSJ in 2014 was the provision of assistance to food processors/exporters

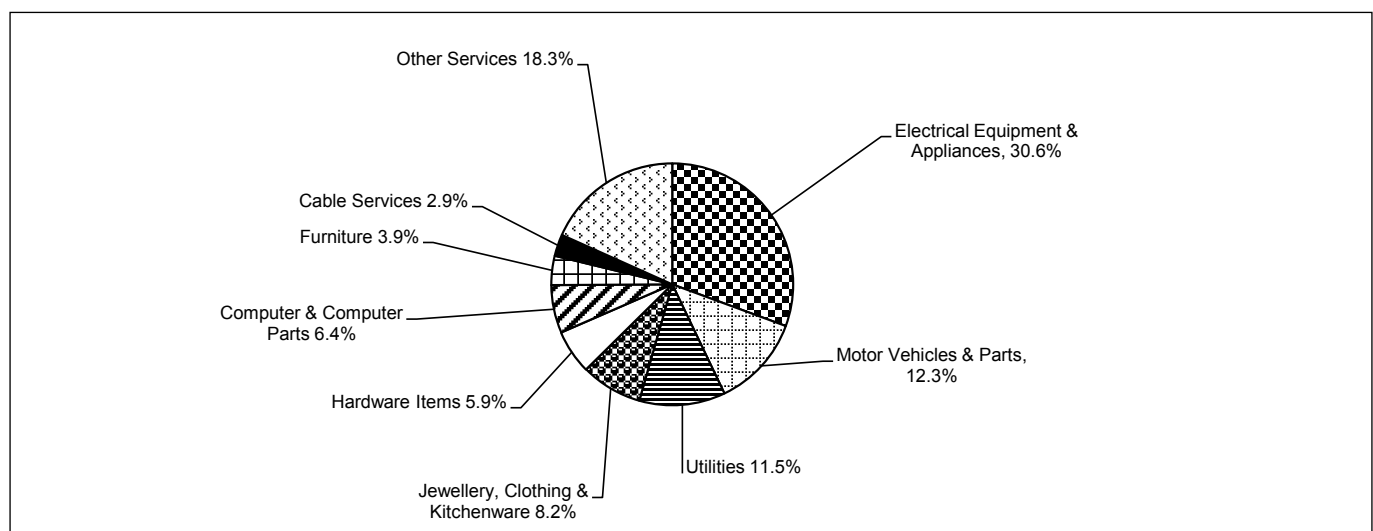


FIGURE 19B: COMPLAINTS RECEIVED BY THE CAC BY CATEGORY, 2014

TABLE 19.3
OUTPUT AND EMPLOYMENT TRENDS IN DISTRIBUTION, 2010-2014

	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014
Contribution to GDP (%)	18.1	17.9	17.7	17.7	17.6
WRTRIM Growth Rate (%)	-3.8	0.3	-1.4	-0.1	0.2
Overall GDP Growth (%)	-1.5	1.4	-0.5	0.2	0.4
Persons Employed	214 675	211 350	219 350	221 525	226 425
Share of Total Employment (%)	19.3	20.0	20.1	20.0	20.1
GDP per worker (constant 2007 prices, \$)	610 574	622 274	590 990	584 470	572 918

r - revised

Source: Compiled by Planning Institute of Jamaica with data from the Statistical Institute of Jamaica

to satisfy requirements of the US Food Safety Modernization Act (FSMA) and the Safe Food for Canadians Act. This was done by providing technical assistance to food and fresh produce exporters and by facilitating knowledge transfer sessions. These sessions included:

- i. Supervision by the BSJ of a Better Process Control School on behalf of the Food and Drug Administration (FDA), which provided an essential certification course for supervisors of the processing operations in factories that process low acid and acidified foods (e.g. canned ackee, calaloo, and sauces). Thirty persons were successfully trained.
- ii. A training session on US FDA inspections for food inspectors by two representatives from the FDA.
- iii. Two Canadian Food Inspection Agency webinars for industry and regulatory agencies and food safety consultants.
- iv. Presentations on the two Acts to approximately 180 individuals.

Other programmes undertaken included:

- Accreditation from Jamaica National Agency for Accreditation (JANAAC) of the BSJ's food testing laboratories, namely Chemistry, Microbiology and Packaging. The Chemistry Laboratory was accredited in March and is valid for four years. The accreditation provides assurance of the analytical capabilities of the laboratory and its staff as well as the integrity and scientific validity of the test results for foods tested. An on-site accreditation assessment of the Microbiology and Packaging Laboratories was done by JANAAC in December.
- Continued revisions of the Standards Act 1969, and proposed amendments to the Standards Act and associated Cabinet Submission was submitted for review to the Attorney General's Chambers.

Under the Standards Compliance Programme, the BSJ monitored imported goods and locally manufactured items, to ensure that they conformed to the relevant standards. During

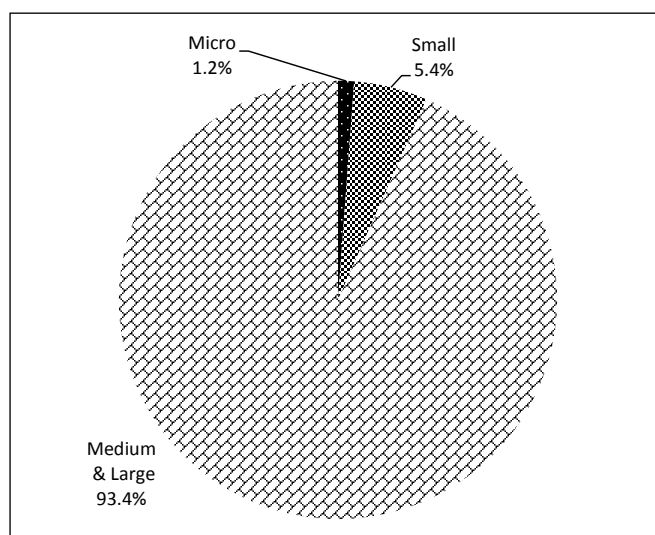


FIGURE 19C: SHARE OF TOTAL SALES BY FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2014

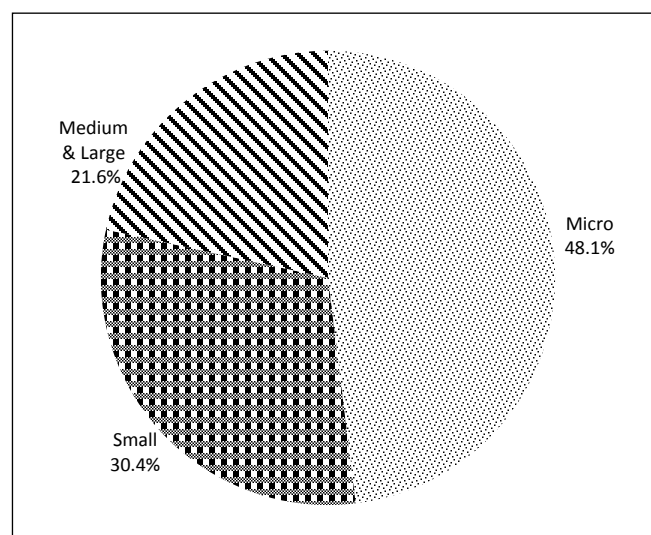


FIGURE 19D: SHARE OF FIRMS FILING GCT RETURNS IN THE WHOLESALE & RETAIL TRADE AND INSTALLATION OF MACHINERY INDUSTRY, 2014

the review period, there were 15 410 sites visited compared with 15 182 in 2013. Sites visited included:

- Ports of Entry – Kingston Container Terminal, Kingston Wharves, Seaboard Freight, Norman Manley International Airport, Sangster International Airport, Montego Bay Freeport, bonded warehouses and cold storages
- Site – Warehouses at the premises of importers, distributors and manufacturers
- The Domestic Market – supermarkets, shops, wholesales, pharmacies; furniture, appliances, hardware and department stores
- Food processing establishments.

At the Ports of Entry and Site, of the 4 987 consignments inspected, 100 were detained. This resulted in a 98.0 per cent conformance rate, which was 1.0 percentage point higher than 2013.

In the Domestic Market, of the 122 844 goods inspected, 3 047 were withdrawn from sale. The conformance rate of 98.0 per cent for 2014 was an increase of 2.0 percentage points compared with 2013. Items that were detained or withdrawn included:

- Garments – for the absence of labels or care instructions, material composition and/or country of origin
- Footwear – for no information on material composition, country of origin or label
- 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.

Additionally, other goods including construction materials such as cement, alu-zinc coils, and reinforcing steel bars; LPG cylinders and valves; and appliances such as fans, stoves, and hotplates, were detained at the ports of entry and site for conformance testing. Those goods that failed to meet the requirements were allowed to be rehabilitated, where possible. Where rehabilitation was undertaken, the goods were inspected again by the BSJ inspectors to verify conformance to the required standards. Approval for sale was only granted if conformance was verified. Where rehabilitation was not possible, the directive was given for the goods to be re-exported or destroyed.

PERFORMANCE

Industry Composition²

Analysis of preliminary GCT data revealed that 93.4 per cent of total sales were accounted for by Medium & Large firms. Small Firms and Micro Enterprises accounted for 5.4 per cent and 1.2 per cent of total sales, respectively (Figure 19C). Of the total firms filing returns, 48.1 per cent was Micro Firms, 30.4 per cent Small Firms and 21.6 per cent Medium & Large Enterprises (Figure 19D).

Gross Sales of Registered Firms³

Review and analysis of preliminary General Consumption Tax (GCT) data showed that three of the eight goods categories recorded improved sales for calendar year 2014. These were: Wholesale and Repair of Household Goods; Hardware, Building Supplies, Electrical Goods & Machinery; and Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores (see Table 19.4). Combined, these categories accounted for 42.5 per cent of total sales.

Distributors of **Wholesale & Repair of Household Goods** recorded the highest increase (8.0 per cent) in gross sales for 2014 compared with 2013. This was due to a 12.8 per cent increase in the subcategory *Wholesale of Other Household Goods* and a 5.8 per cent increase in the subcategory *Retail Sale of Household Appliances, Articles and Equipment*.

Gross sales from **Hardware, Building Supplies, Electrical Goods & Machinery** increased by 2.6 per cent. This out-turn was due to the combined effect of:

- Retail Sale of Hardware Paint and Glass (*up 2.9 per cent*)
- Wholesale of Other Intermediate Products, Waste and Scrap (*up 2.7 per cent*)
- Wholesale of Construction Material, Hardware, Plumbing and Heating Equipment and Supplies (*up 1.8 per cent*)
- Wholesale of Machinery, Equipment and Supplies (*down 37.3 per cent*).

The **Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores** category accounted for 24.2 per cent of gross sales and recorded increased sales of 1.5 per cent. This result was influenced by:

- Other Non-Store Retail Sale (*up 15.1 per cent*)
- Other Wholesale (*up 6.1 per cent*).

2. Micro enterprises are defined as registered firms with an annual turnover of less than \$10 000 000.00. Small firms are enterprises with an annual turnover of between \$10 000 000.00 and \$50 000 000.00. Medium and Large businesses carry an annual turnover of over \$50 000 000.00.
3. Firms are now classified under the Jamaica Industrial Classification 2005; consequently the categories will differ from previous editions of this publication.

The higher out-turn was constrained by contractions recorded in:

- Retail Sale Via Stalls and Markets (*down 22.9 per cent*)
- Wholesale on a Fee or Contract basis incl. Commission Agents, Merchandise and Commodity Brokers (*down 6.9 per cent*)
- Other Retail Sale in Non-Specialized Stores (*down 5.4 per cent*)
- Other Retail Sale in Specialized Stores (*down 4.3 per cent*).

Of the categories that a recorded decline in sales, the largest contraction (15.5 per cent) was for distributors of **Motor Vehicles, Auto Repairs & Accessories** (see Table 19.4). This result was due to a 21.3 per cent decrease in the subcategory *Sale of Motor Vehicles*, an 11.5 per cent decline in the *Sale of Motor Vehicle Parts and Accessories* subcategory and a 24.9 per cent decrease in the *Sale, Maintenance and Repair of Motorcycle and Related Parts and Accessories* subcategory. These declines outweighed the 11.6 per cent increase in the subcategory *Maintenance and Repair of Motor Vehicles*.

The **Pharmaceuticals, Medical Goods & Cosmetics** category recorded a decline of 9.0 per cent. Consistent with this out-turn was a decline in both subcategories: *Pharmaceuticals & Medical Goods*, down 9.0 per cent and *Cosmetics*, down 23.0 per cent.

Accounting for the largest share of gross sales in 2014 was the **Minerals, Fuels, Lubricants & Petroleum Products** category, which recorded a decline of 3.3 per cent in sales. This was due to respective declines of 14.7 per cent and 44.2 per cent in the *Retail Sale of Automotive Fuel* and *Wholesale of Solid, Liquid and Gaseous Fuels and Related Products* subcategories. These declines outweighed an increase of 4.3 per cent in the *Retail Sale of Petroleum Products (ecf Automotive Fuel)* subcategory.

Distributors of **Textiles, Clothing, Shoes & Jewellery** recorded a decline of 4.3 per cent during 2014. The decline stemmed from a contraction of 13.6 per cent in the subcategory *Wholesale of Textiles, Clothing and Footwear* which outweighed an increase of 2.2 per cent in the subcategory *Wholesale of Textiles, Clothing, Footwear and Leather Goods*.

A reduction of 5.0 per cent was registered for **Agriculture, Food, Beverage & Tobacco**, the third largest category. Lower sales stemmed from decreases in:

- Wholesale of Agricultural Raw Materials and Live Animals (*15.9 per cent*)
- Wholesale of Food, Beverages and Tobacco (*6.6 per cent*).

A further decline was tempered by increases of:

- Retail Sale of Predominantly Food, Beverages or Tobacco in Non-Specialized Stores (*1.1 per cent*)
- Retail Sale of Predominantly Food, Beverages or Tobacco in Specialized Stores (*1.7 per cent*).

Employment

An average of 226 425 persons were employed in the WRTRIM industry, 31 350 more than in 2013. Of the total persons employed in the industry, 54.3 per cent was female compared with 55.4 per cent in 2013. For the year, average real value added per worker in the industry stood at \$572 918.06 compared with \$584 469.94 in 2013 (Table 19.3).

Credit

The stock of Loans & Advances to distributors by Commercial Banks increased by 11.7 per cent (5.0 per cent in real terms) to \$49 101.1 million at the end of 2014. Similarly, the stock of Loans & Advances to consumers amounted to \$178 123.9 million, an increase of 6.4 per cent. In real terms,

TABLE 19.4
GROWTH IN GROSS SALES IN WHOLESALE & RETAIL TRADE; REPAIR & INSTALLATION OF MACHINERY, 2013-2014

Goods Category	Sales Growth (%)		Per Cent of Sales (%)	
	2013 ^r	2014 ^p	2013 ^r	2014 ^p
Motor Vehicles, Auto Repairs & Accessories	-6.0	-15.5	9.1	8.5
Minerals, Fuels, Lubricants & Petroleum Products	0.1	-3.3	25.8	25.8
Wholesale & Repair of Household Goods & Office Equipment	0.2	8.0	8.7	9.4
Agriculture, Food, Beverages & Tobacco	-5.0	-2.2	17.8	18.5
Textiles, Clothing, Shoes & Jewellery	3.6	-4.3	1.5	1.4
Hardware, Building Supplies, Electrical Goods & Machinery	2.5	2.6	8.1	8.8
Pharmaceuticals, Medical Goods & Cosmetics	0.7	-9.0	2.6	2.4
Other Wholesale & Retail Sale of Goods & Services in Specialized & Non-Specialized Stores	3.5	1.5	27.5	24.2
TOTAL			100.0	100.0

p - preliminary

r - revised

Source: Estimated based on GCT data from E-Gov Jamaica Limited

TABLE 19.5
LOANS & ADVANCES OUTSTANDING TO FIRMS IN WRTRIM AND TO CONSUMERS, 2012-2014 (\$ Million)

	2012	2013	2014	2014/2013 Per Cent Change	
				Nominal	Real
Commercial Bank Loans to:					
Distribution	40 054.7	43 966.8	49 101.1	11.7	5.0
Consumers	135 151.6	167 371.0	178 123.9	6.4	0.1
F.I.A. Institutions to:					
Distribution	397.5	1 323.3	1 698.0	28.3	20.6
Consumers	2 161.5	2 834.6	3 764.3	32.8	24.9

Source: Bank of Jamaica

the stock to consumers was 0.1 per cent higher relative to the end of 2013 (Table 19.5).

Analysis of the stock of Loans & Advances held by institutions licensed under the Financial Institutions Act (FIA) to distributors totalled \$1 698.0 million, 28.3 per cent (20.6 per cent in real terms) higher than the previous year. The stock of Loans & Advances to consumers was \$3 764.3 million, a 32.8 per cent (24.9 per cent in real terms) improvement compared with 2013.

Imports

The value of total merchandise imports decreased by 4.8 per cent to US\$5 838.2 million compared with 2013. The movements of the product groups which generated this outcome were as follows:

- Chemicals (*down 17.6 per cent*)
- Mineral Fuels, etcetera (*down 11.0 per cent*)
- Animal & Vegetable Oils and Fats (*down 9.2 per cent*)
- Beverages and Tobacco (*down 5.7 per cent*)
- Food (*down 4.5 per cent*)
- Other (*down 0.2 per cent*).

These outweighed:

- Crude Materials (excl. fuel) (*up 14.2 per cent*)
- Miscellaneous Manufactured Articles (*up 11.2 per cent*)
- Machinery & Transport Equipment (*up 6.8 per cent*)
- Manufactured Goods (*up 2.3 per cent*).

Jamaica imported US\$764.4million worth of merchandise from CARICOM; a decrease of US\$162.5. This was due primarily to decreased spending on the category Mineral Fuels etcetera, which fell by US\$142.1 million to US\$507.6

million, due to lower imports of petroleum, petroleum products and other related materials.

GLOBAL WHOLESALE & RETAIL TRADE

Global GDP growth for 2014 was 3.3 per cent. Consistent with this expansion in global economic activity, wholesale and retail trade increased globally. This growth was associated with higher levels of consumer expenditure.

For the US economy, Personal Consumption Expenditure increased by 2.5 per cent in 2014 compared with the previous year. This increase stemmed from a 3.5 per cent increase in the Goods subcategory as well as an increase of 2.0 per cent in the Services subcategory. Within the Goods subcategory, there were increases of 7.0 per cent and 1.8 per cent on Durable and Nondurable Goods, respectively.

China's Total Retail Sales of Consumer Goods recorded a real increase of 10.9 per cent compared with 2013. This reflected high levels of domestic demand, further evidenced by increased consumption of all good types. A disaggregation by consumption patterns showed that income of the Catering Industry improved by 9.7 per cent and Retail Sales of Goods increased by 12.2 per cent.

The GDP growth in the United Kingdom was 2.6 per cent for calendar year 2014. Consistent with that was a growth rate of 4.4 per cent in the Distribution, Hotels & Restaurants industry. The retail portion of the industry made the larger contribution to the increase.

OUTLOOK

For 2015, real value added for the WRTRIM industry is projected to increase. This forecast is predicated on improvements in global demand as well as the expected recovery in domestic economic activity. Additionally, anticipated growth in the related Construction, Manufacture, and Agriculture industries is expected to bolster distributive trade activities.

The BSJ will undertake several projects in the upcoming year. Among these are the:

- Capacity Building for Market Access Project, expected to commence in April 2015, with a two-year implementation period. The two components of the projects are:
 - Establishment of a modern packaging laboratory
 - Design and development of a new website
- World Bank Project – to enhance the BSJ’s role in the areas of trade facilitation, industrial growth and the protection of the health and safety of the Jamaican people. The project will undertake legislative and regulatory reform, upgrading of laboratory facilities and the ICT infrastructure, human capacity building,

and expansion of the scope of services offered to facilitate the development and strengthening of businesses. In addition, there will be a replacement of the non-World Trade Organization compliant system of compulsory standards with a system for technical regulations.

- Capacity Building in Jamaican MSMEs in the Agro-processing Sector to Satisfy International Food Safety Requirements Project – In collaboration with the Caribbean Development Bank (CDB)/Caribbean Technological Consultancy Services (CTCS) the BSJ will aim to develop a cadre of 28 competent workers to implement food safety systems in 14 food processing facilities. The project is expected to commence March 2015. ■

DEMOGRAPHICS AND THE LABOUR MARKET



General construction workers get job experience at a construction site of a prominent hotel chain.

Photograph contributed by IDB

POPULATION

INTRODUCTION

Population dynamics play a critical role in shaping the present and future development agenda. Ongoing shifts in Jamaica's population associated with changing levels and patterns of fertility, mortality and migration continue to impact size, structure and distribution. These dynamics interact with prevailing social, environmental and economic conditions, influencing a country's capacity to achieve its development

goals. These changes also play a vital role in shaping and determining the extent and pace of development outcomes, and ultimately the promotion of well-being of current and future generations. In light of this, the Government of Jamaica (GOJ) has made a concerted effort to integrate population dynamics into national development goals as outlined in the Population Sector Plan of *Vision 2030 Jamaica—National Development Plan*. The vision of the sector plan speaks to

TABLE 20.1
POPULATION GROWTH STATISTICS, 2000–2014

Year	NUMBER					RATE (PER 1 000 POPULATION)						
	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
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	2 676 700	2 671 900	43 100	20 000	-13 700	23 100	9 400	16.1	7.5	-5.1	8.6	0.4
2009	2 686 100	2 681 400	42 800	18 900	-14 500	23 900	9 400	16.0	7.0	-5.4	8.9	0.4
2010	2 695 500	2 690 800	40 500	21 500	-9 700	19 000	9 300	15.1	8.0	-3.6	7.1	0.3
2011	2 704 100	2 699 800	39 700	16 900	-14 500	22 800	8 300	14.7	6.3	-5.4	8.4	0.3
2012 ^r	2 711 500	2 707 800	39 600	17 000	-15 000	22 600	7 600	14.6	6.3	-5.5	8.3	0.3
2013 ^r	2 717 900	2 714 700	38 500	17 400	-14 700	21 100	6 400	14.2	6.4	-5.4	7.8	0.2
2014 ^p	2 723 200	2 720 600	37 900	17 600	-14 900	20 300	5 400	13.9	6.5	-5.5	7.4	0.2

- a. Figures in Cols. 2–8 are approximated to the nearest hundred.
 b. Births and Deaths are based on events occurring in the year and registered up to 12 months after. However, births and deaths represent events reported by the Registrar General's Department (RGD) and are adjusted for under coverage by STATIN.
 c. 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.
 d. Discrepancies are due to rounding.
 e. All data are provisional and subject to change.

r - revised

p - provisional

Source: Statistical Institute of Jamaica (STATIN)

“a population which meets the sustainable development needs of the country”¹. Jamaica remains on track to achieve the population-related goals of Vision 2030 Jamaica. These include: population stabilization; increase in life expectancy; reduction in growth rates and fertility levels; reduction in infant, under-five and maternal mortality; and universal access to reproductive health.

The analysis of population dynamics will cover the period 1994–2014 in recognition of 20 years of implementation of the International Conference on Population and Development Programme of Action (ICPD PoA). The ICPD PoA formed the framework for Jamaica’s revised National Population Policy (1995) and Plan of Action. Since 1994/1995, Jamaica’s demographic situation has changed considerably. Analysis of demographic trends for this 20-year period will highlight the successes and failures of the implementation of the national population programme as outlined in the policy.

POPULATION SIZE AND GROWTH

The interplay of population characteristics—fertility, mortality and migration— influence the rate of growth of the population. Live births were estimated at 37 900 and deaths at 17 600, which resulted in a natural increase (births minus deaths) of 20 300. Net external movements were 14 900. The rate of natural increase was 7.4 persons per 1 000 population (Table 20.1). When compared with 1994, natural increase of the population was 42 500, (59 200 births and 13 500 deaths), while loss to net external movements was 18 100. The rate of natural increase was 18.6 persons per 1 000 population, a decline of approximately 60.0 per cent over the period. Overall, these changes in population characteristics produced a decline in the estimated growth rate from 1.1 per cent in 1994 to 0.2 per cent in 2014. Based on this current trend, the population is not expected to exceed 3.0 million by 2020² as outlined in the National Population Policy.

POPULATION AGE STRUCTURE

Jamaica is currently at the intermediate stage of the demographic transition and has demonstrated evidence of being an ageing population. Ageing is a direct consequence of the changing mortality and fertility patterns. This stage is characterized by changes in the age structure of the population, namely: declining child (0–14 years); and an increasing working age (15–64 years) and dependent (65+ years) elderly populations. The resulting decline in the overall dependent population (children and elderly) relative to the working age produces a “demographic dividend”. This dividend can

be harnessed to promote economic development and boost investment, creating a better standard of living. Throughout the period under review, the increase in the working age and dependent elderly population and the decline in the child population were evident (Figure 20A).

The end-of-year population disaggregated by sex indicates 1 348 000 males (49.5 per cent) and 1 375 200 females (50.5 per cent) {Table 20.2 and Figure 20B}. The sex ratio was 98.0 males per 100 females compared with 96.5 males per 100 females in 1994. Over the review period, there was an overall increase in sex ratios across all three broad age groups:

- 103.3 males per 100 females for children 0–14 years, from 102.3 males per 100 females in 1994
- 97.6 males per 100 females in the working age group (15–64 years) from 95.2 males per 100 females in 1994
- 87.1 males per 100 females in the 65+ age range, from 82.3 males per 100 females in 1994.

Although, the male population has increased, the preponderance of women is largely due to their higher survival rates than men.

There was a marked decline in the child (0–14 years) population between 1994 and 2014. In 1994, this population was 832 400 compared with 653 600 in 2014. Population projections indicate that this population will continue to decline (Figure 20C). On the contrary, the working age population (15–64 years) expanded considerably to 1 835 900 in 2014 from 1 450 500 in 1994. Projections have indicated a continued increase in this age group up to year 2020 (see Figure 20C).

Similar to the working age population, the elderly population (60+ years) grew throughout the period. In 1994, the elderly population totalled 249 700 relative to 324 200 in 2014. This increase of 29.8 per cent is in keeping with trends associated with the ageing of the population. The proportion of “dependent elderly” (65+ years) increased by 26.0 per cent to 233 700 in 2014 from 185 466 in 1994. Further increases are expected in this age group based on projections up to 2050.

The Age Dependency Ratio (ADR)³ provides a measure of the relative age structure of the population and has implications for social and economic development. In 2014, the ADR for Jamaica was 48.3 dependents per 100 persons of

1. Planning Institute of Jamaica, Vision 2030 Jamaica – National Development Plan, Population Sector Plan (Kingston: PIOJ, 2010).

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

3. The age dependency ratio represents the ratio of the combined child population (0–14 years) and aged population (65+ years) to the population of intermediate age (15–64 years). See Jacob Siegel/David A. Swanson, eds., *The Material and Materials of Demography, Second Edition* (San Diego: Elsevier Academic Press, 2004).

TABLE 20.2
POPULATION OF JAMAICA BY AGE AND SEX, END OF YEAR, 2011–2014

AGE GROUP	NUMBER							
	2011		2012		2013 ^r		2014 ^p	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
TOTAL	1 337 800	1 366 300	1 341 700	1 369 800	1 345 400	1 372 400	1 348 000	1 375 200
TOTAL POP.	2 704 100		2 711 500		2 717 900		2 723 200	
0–4	104 400	101 700	102 400	99 600	99 500	95 900	99 700	96 100
5–9	113 000	110 100	110 600	107 700	108 700	106 300	108 900	106 500
10–14	132 000	126 700	127 400	122 400	123 300	118 600	123 500	118 900
15–19	141 600	136 400	142 000	136 900	138 800	134 300	139 100	134 600
20–24	126 300	125 400	127 500	125 700	130 000	127 300	130 300	127 500
25–29	110 400	116 200	110 900	115 400	112 100	115 200	112 300	115 400
30–34	89 500	98 900	93 300	102 000	97 800	105 500	97 900	105 800
35–39	85 700	96 000	83 600	94 200	82 500	93 100	82 700	93 300
40–44	85 900	92 200	86 500	93 300	85 700	93 300	85 900	93 400
45–49	80 400	79 000	80 500	81 400	81 300	83 900	81 400	84 100
50–54	68 500	69 900	71 100	70 900	73 300	72 000	73 400	72 100
50–55	52 100	51 600	54 900	55 200	57 700	58 300	57 800	58 400
60–64	45 000	43 300	45 400	43 600	45 800	44 500	45 900	44 600
65–69	33 900	33 600	35 300	34 900	36 700	36 100	36 800	36 200
70–74	25 000	26 600	25 400	27 000	26 100	27 400	26 200	27 500
Over 75	44 100	58 700	44 900	59 600	46 100	60 700	46 200	60 800

AGE GROUP	PERCENTAGE							
	2011		2012		2013		2014	
	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	3.9	3.8	3.8	3.7	3.7	3.5	3.7	3.5
5–9	4.2	4.1	4.1	4.0	4.0	3.9	4.0	3.9
10–14	4.9	4.7	4.7	4.5	4.5	4.4	4.5	4.4
15–19	5.2	5.0	5.2	5.1	5.1	4.9	5.1	4.9
20–24	4.7	4.6	4.7	4.6	4.8	4.7	4.8	4.7
25–29	4.1	4.3	4.1	4.3	4.1	4.2	4.1	4.2
30–34	3.3	3.7	3.4	3.8	3.6	3.9	3.6	3.9
35–39	3.2	3.6	3.1	3.5	3.0	3.4	3.0	3.4
40–44	3.2	3.4	3.2	3.4	3.2	3.4	3.2	3.4
45–49	3.0	2.9	3.0	3.0	3.0	3.1	3.0	3.1
50–54	2.5	2.6	2.6	2.6	2.7	2.6	2.7	2.6
55–59	1.9	1.9	2.0	2.0	2.1	2.1	2.1	2.1
60–64	1.7	1.6	1.7	1.6	1.7	1.6	1.7	1.6
65–69	1.3	1.2	1.3	1.3	1.4	1.3	1.4	1.3
70–74	0.9	1.0	0.9	1.0	1.0	1.0	1.0	1.0
Over 75	1.6	2.2	1.7	2.2	1.7	2.2	1.7	2.2

r - revised
p - provisional

Source: Data supplied by the Statistical Institute of Jamaica

working age compared with 70.2 dependents per 100 persons of working age in 1994. A low ADR is indicative of an increase in human capacity and resources to foster economic growth and development. To fully capitalize on this increase in the working age population, there is the need for greater matching of skills to meet labour requirements.

FERTILITY AND FAMILY PLANNING

The policy statement on fertility as outlined in the National Population Policy states that fertility would decline from almost six births in 1960 to approximately 2.0 children by the year 2000. Jamaica has recorded declines in Total Fertility

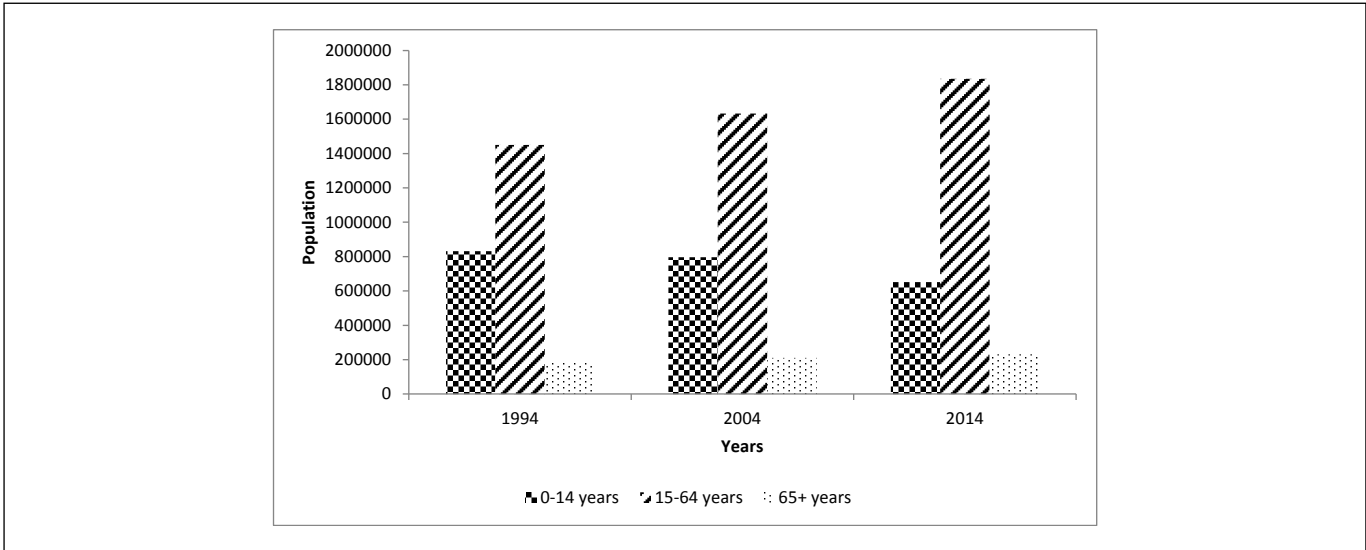


FIGURE 20A: POPULATION BY AGE GROUP FOR THE YEARS 1994, 2004 AND 2014

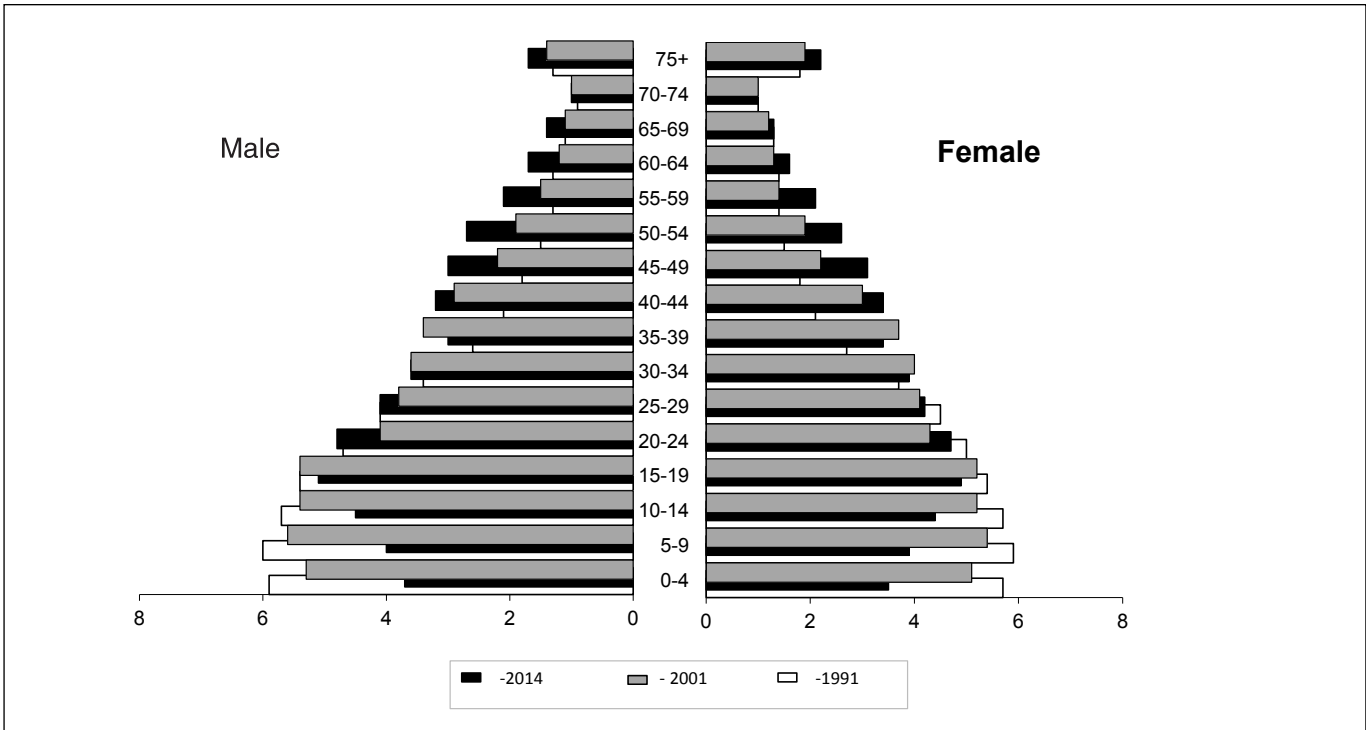


FIGURE 20B: POPULATION BY AGE AND SEX, CENSUS 1991, 2001 AND ESTIMATES 2014

Rate (TFR) from 3.0 children per woman in 1994 to 2.4 children per woman in 2008. This continued decline places Jamaica on the path to achieve replacement level fertility⁴ which is in line with the goal statement in the policy “declining to approximately 2.0 children per woman by the year 2000 or shortly thereafter” (Figure 20D). In 1994, there were

approximately 59 200 births which equated to a Crude Birth Rate (CBR) of 23.7 births per 1 000 population. The number of births has declined consistently over the years. In 2014, there were approximately 37 900 births, resulting in a CBR of 13.9 births per 1 000 population. The rapidly declining trend

4. Replacement level fertility occurs when a woman has an average of 2.1 children who would replace their mother and father, once all children survived to reproductive age. The 0.1 is needed to offset the effects of premature mortality and the unbalanced sex ratio at birth. See Donald T. Rowland, *Demographic Methods and Concepts* (New York: Oxford University Press, 2003).

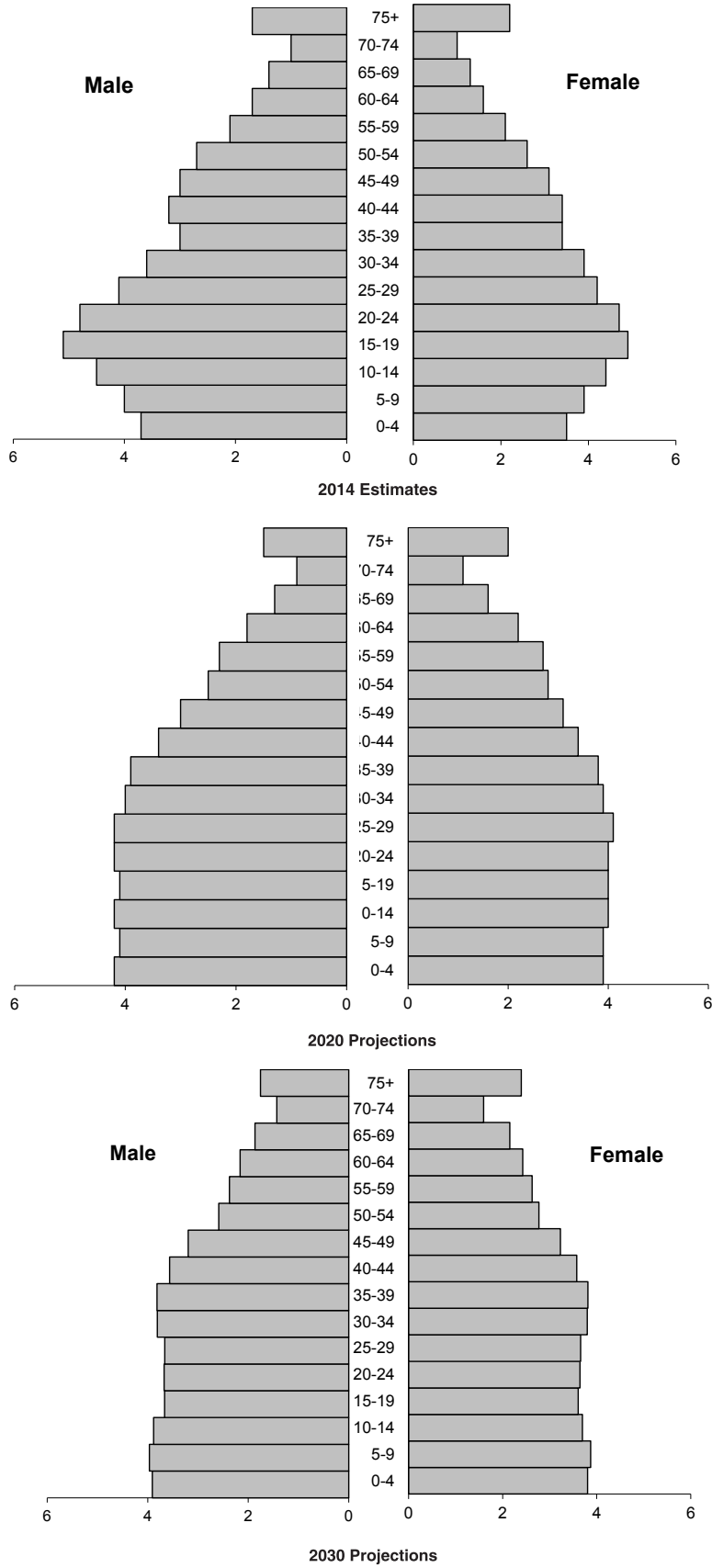


FIGURE 20C: PER CENT DISTRIBUTION OF POPULATION BY AGE AND SEX FOR 2014 AND PROJECTIONS FOR 2020 AND 2030

in births is a feature of countries moving towards the final stage of the demographic transition (see Table 20.1).

There were approximately 729 600 women in the reproductive age group, which resulted in a General Fertility Rate (GFR)⁵ of 51.9 births per 1 000 women (Table 20.3a). The decrease in the GFR compared with 1994 (93.3 births per 1 000 women) was attributable to the decline in births relative to the increase in women in the 15–49 age group (Figure 20E). The age-specific fertility rates (ASFR) have also declined in all five-year age groups of women of reproductive age, 15–49 years. Adolescent (15–19 years) fertility rates declined from 112 births per 1 000 in 1997 to 72 births per 1 000 women in 2008 (Figure 20E). The decline was as a result of interventions such as public awareness campaigns and sensitization programmes specifically targeted at adolescents. The Population Sector Plan recommends that “considerable efforts and more integrated and innovative programmes will have to be pursued and sustained for ensuring further reductions. Family planning programmes and those for sexually transmitted infections including HIV/AIDS should be fully integrated into a comprehensive reproductive health programme for adolescents and youth.”

Overall, the decline in births is as a result of several factors including: increased contraceptive prevalence; delays in childbearing; decline in unmet need for family planning; and improved educational attainment of women.

Among new acceptors attending family planning clinics in the public sector for January to June, the Injection continued to be the popular method of choice, accounting for 54.9 per cent (Table 20.3b). The Male Condom and Pill were the second and third most popular methods, with 22.4 per cent and 19.8 per cent, respectively (see Table 20.3b). There was an overall decline in the number of new acceptors relative to the same period last year, from 20 313 to 19 012. However, an increase was recorded for the Intrauterine Device (IUD), from 534 to 508. The decline in usage was influenced by stockouts which affected the procurement of adequate quantities.

Dual Method Use (DMU) describes individuals who use the condom with a secondary method of contraception, such as the Pill. The **National Family Planning Board (NFPB)** reported that the total number of new family planning acceptors practising DMU declined by 16.8 per cent, from 41 153 in January to June 2013 to 34 237 for the corresponding period. The South-East Regional Health Authority (SERHA) accounted for the largest proportion of all users (51.9 per cent) while adolescents (10–19 years) recorded the least number of all DMU (12.3 per cent). Throughout the year, the NFPB continued to spearhead activities on sensitizing the public on the benefits of DMU. This is considered the most appropriate mechanism in reducing the incidence of HIV/AIDS and STIs as well as preventing unplanned, unwanted and mistimed pregnancies.

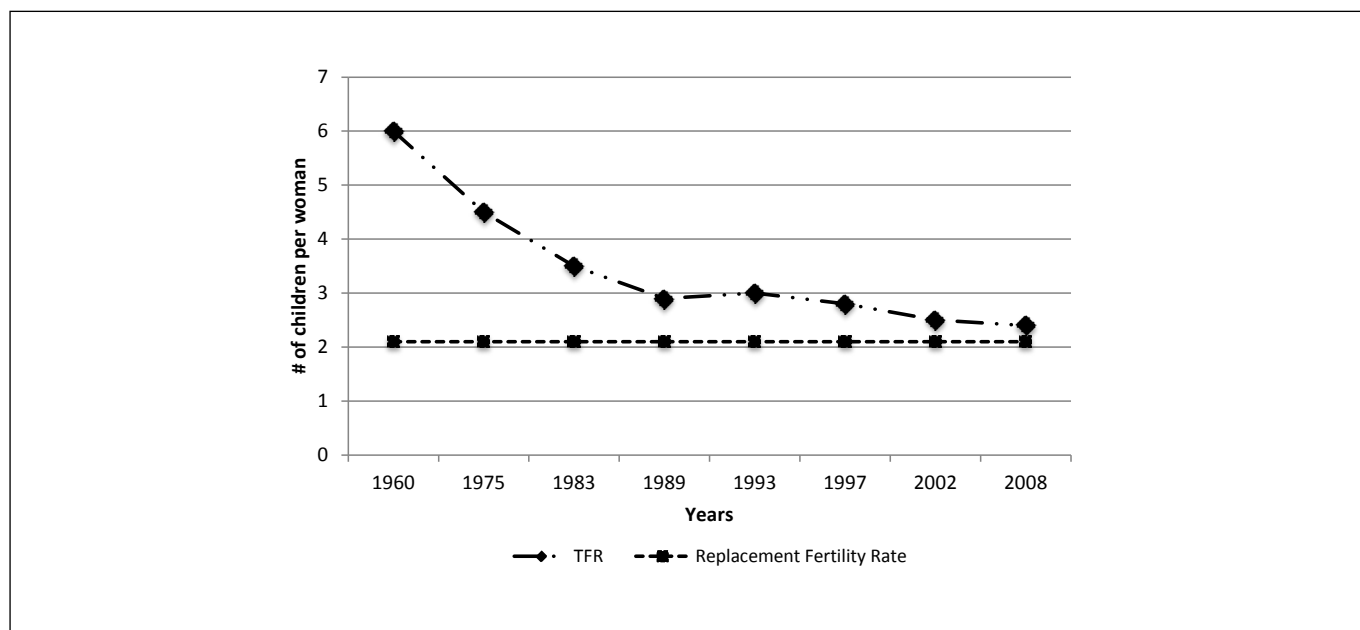


FIGURE 20D: TOTAL FERTILITY RATES 1960–2008, AGAINST REPLACEMENT LEVEL FERTILITY

5. The General Fertility Rate (GFR) is a measure that relates total births to the number of women in the reproductive age group, 15–49 years.

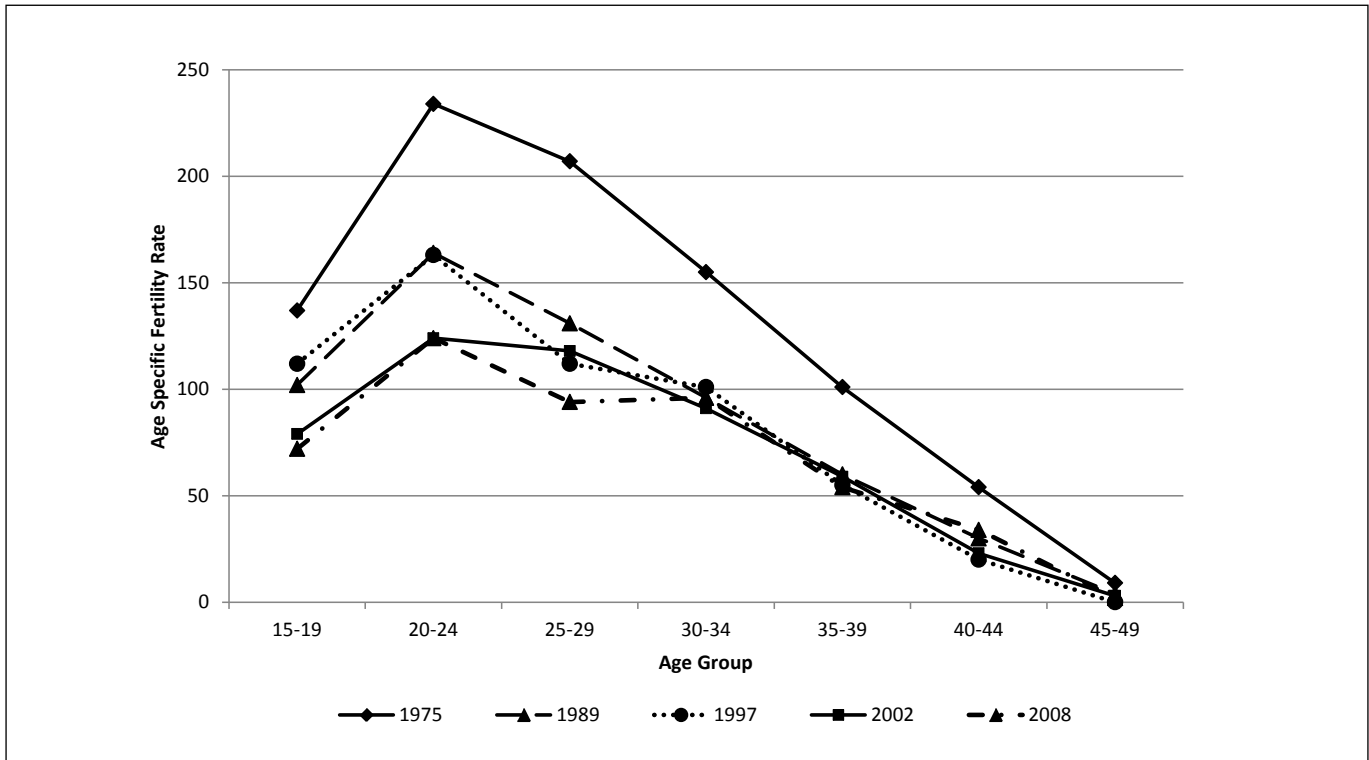


FIGURE 20E: AGE SPECIFIC FERTILITY RATES, SURVEY YEARS

In April 2013, the enabling environment and human rights components of the National HIV/STI Programme (NHP) were integrated into the mandate of the NFPB. The merger resulted in the establishment of the NFPB–Sexual Health Agency. The objective of this new entity is aimed at facilitating an inclusive and holistic approach in the provision of services that will lead to:

- improved efficiencies through minimal duplication
- greater financial sustainability
- institutional sustainability
- improved contraceptive choice and safety
- reduced STI rates including HIV
- healthy sexuality including adolescent health and increased adoption of healthy sexual practices.

The inaugural NFPB Sexual and Reproductive Health Conference was held in November 2014 under the theme “Repositioning Sexual and Reproductive Health for the Future”. The conference was attended by approximately 190 persons representing ministries, departments and agencies (MDAs) as well as representatives from the private sector, civil society organizations (CSOs), and academia. The objectives of the conference were to:

- share local and regional Sexual and Reproductive Health (SRH) research to improve programmes
- provide training to improve contraceptive knowledge and client counselling
- discuss global guidelines to strengthen SRH programmes.

The NFPB engaged in training exercises which primarily focused on information exchange and building capacity of staff to mainstream the new mandate. Training sessions were also undertaken with 90 Community Peer Counsellors; 48 teen mothers; 10 out-of-school youth; 159 pre-service nurses; 20 fathers; 122 parents/caregivers; and 20 university students. The out-of-school youth and fathers played an integral role in the development of the curricula for the training sessions. Several advocacy activities undertaken throughout the year included: numerous media appearances; mounting of a dual method communications campaign; staging of Family Week; and execution of World AIDS Day. The Marge Roper Counselling Services expanded its outreach services through the counsellor’s attendance and participation in rap sessions at high schools, the Women’s Centre of Jamaica Foundation (WCJF) and community summer camps. Special effort was made to incorporate persons with disabilities (PWDs) in all plans, programmes and activities of the NFPB.

TABLE 20.3a
DISTRIBUTION OF WOMEN IN THE REPRODUCTIVE
AGES (15–49) ESTIMATES, 2011–2014

AGE GROUP	2011	2012 ^r	2013 ^r	2014	2011	2012	2013	2014
15–19	136 400	136 900	134 300	139 100	18.3	18.3	17.8	19.1
20–24	125 400	125 700	127 300	130 300	16.9	16.8	16.9	17.9
25–29	116 200	115 400	115 200	112 300	15.6	15.4	15.3	15.4
30–34	98 900	102 000	105 500	97 900	13.3	13.6	14.0	13.4
35–39	96 000	94 200	93 100	82 700	12.9	12.6	12.4	11.3
40–44	92 200	93 300	93 300	85 900	12.4	12.5	12.4	11.8
45–49	79 000	81 400	83 900	81 400	10.6	10.9	11.1	11.2
TOTAL	744 100	748 900	752 600	729 600	100.0	100.0	100.0	100.0
GFR	55.5	52.9	51.2	51.9				

r - revised

Note: Discrepancies due to rounding

Source: Statistical Institute of Jamaica (STATIN)

TABLE 20.3b
UTILIZATION AND COVERAGE OF PUBLIC SECTOR FAMILY PLANNING SERVICES, 2010–2014

INDICATOR	2010 ^r	2011 ^r	2012 ^r	2013 ^r	2014 ^a
Estimated population for family planning	532 424	539 471	543 008	545 658	n/a
Attendance at family planning clinics	312 314	296 564	303 676	297 508	141 883
Number of family planning users (per annum)	81 508	80 299	82 941	77 853	65 169
Number of new acceptors	39 360	40 925	41 845	40 560	19 021
Number of new acceptors as a % of total users	48.2	51.0	51.0	52.0	29.0
New acceptors < 20 yrs. of age as a % of new acceptors	20.1	19.2	19.6	19.3	21.0
New acceptors as a percentage of target population	7.6	7.9	8.0	7.7	n/a
Male attendance as a % of total attendance	6.6	8.6	8.3	8.0	8.6
Percentage distribution of new acceptors by method					
Pill	21.9	18.4	18.1	17.8	19.8
Injection (DMPA)	55.0	52.2	57.0	56.0	54.9
Male Condom	20.2	26.5	22.0	23.5	22.4
Jadelle/Norplant & IUD	2.9	2.9	2.9	2.6	2.8
TOTAL	100.0	100.0	100.0	100.0	100.0
Number of sterilizations (female)	1 626	1 569	1 893	1 586	673

a - Data reported for 2014 reflect the months of January–June

r - revised

Note: Target population = 68.0 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

n/a - not available

Source: National Family Planning Board (NFPB)

In order to mainstream information communication technology (ICT) into the agency's plans and projects, the NFPB, through a multiagency steering committee, launched a "virtual classroom"⁶ aimed at:

- improving the skill set and knowledge base of young people through access to quality, age-appropriate and culturally relevant information
- strengthening adolescent and youth participation in creating content and driving dialogue on SRH issues that affect them
- increasing the capacity of adolescents and youth-serving organizations to better understand and respond to their client's demand for SRH information and services.

The **Jamaica Family Planning Association (FAMPLAN)** is a non-governmental organization that provides a range of SRH goods and services to users. Over the past three years, FAMPLAN has doubled the number of sites and increased the volume of services delivered. FAMPLAN collaborated with NFPB and the National Health Fund (NHF) to provide contraceptives, and syphilis and HIV testing kits for use at health fairs in order to increase services to low-income individuals. FAMPLAN also supported a number of outreach activities hosted by NFPB aimed at increasing access to services for vulnerable and low-income individuals. Additionally, FAMPLAN supported several health fairs initiated by the Community Renewal Programme (CRP), through a supplemental grant from Population Services International (PSI). This grant was also used to train approximately 30 young people in advocacy and SRH issues.

The **United Nations Population Fund (UNFPA)** under Outcome 1 of their mandate⁷ continued to collaborate with the NFPB in undertaking capacity strengthening exercises. Under this initiative, 35 public health workers were trained in the use of logistics management information systems (LMIS) over a two-day period. The objectives of the training were to:

- strengthen the capacity of public health-care workers in logistics management
- highlight the importance of contraceptive security, records management and data quality in health systems
- promote reproductive health commodity security
- refine monitoring tools used to strengthen data capture at points of service delivery
- strengthen capacity of the staff to effectively manage the supply chain of reproductive health commodities in Jamaica.

6. <https://www.facebook.com/Teen360dotorg> (accessed March 20, 2015).

7. Outcome 1: Increased availability and use of integrated sexual and reproductive health services (including family planning, maternal health and HIV) that are gender-responsive and meet human rights standards for quality care and equity in access.

UNFPA provided support for representatives of the GOJ, and civil society to participate in key international events, including the 58th session of the Commission on the Status of Women (CSW) and the 47th session of the Commission on Population and Development (CPD). This support was critical in ensuring that key national priorities, achievements and areas for additional support to advance Jamaica's development agenda was articulated.

UNFPA also collaborated with government and civil society partners to disseminate the Integrated Strategic Framework for the Reduction of Adolescent Pregnancy in the Caribbean. This document was approved by the Council of Human and Social Development (COHSOD) in May 2014, and seeks to "reduce the number of adolescent pregnancies in each country of the English and Dutch speaking Caribbean by at least 20% between 2014 and 2019".

The publication *The Law and Policy Framework for Adolescent Sexual and Reproductive Health in Jamaica* was disseminated to government and non-government organizations. This publication provided a detailed analysis of the policies and laws affecting adolescents' access to reproductive health information and services, as well as recommendations on ways to address the existing gaps in this area.

MORTALITY

One of the main achievements in twentieth-century Jamaica is the increase in human longevity. The policy statement outlined in the National Population Policy aims "to increase average life expectancy at birth from its present estimated level of approximately 70–72 years to over 75 years by the year 2020". This is further reinforced by the Population Sector Plan which states that "life expectancy at birth should reach 72 years for males and 77 years for females by 2015 and 75 years for males and 80 years for females by 2030." Over the period, life expectancy increased to an average of 74.1 years in 2014 from an average of 70.3 years in 1994. Jamaica is on target to achieving this goal.

The estimated number of deaths increased from 13 500 in 1994 to 17 600 in 2014, resulting in Crude Death Rates (CDR) of 5.4 deaths per 1 000 population in 1994 and 6.5 deaths per 1 000 population in 2014. Data in 1991 indicated that the main causes of death in women were due to cerebrovascular disease; diabetes mellitus; circulatory and pulmonary diseases; and heart disease. Among men, the situation was similar: cerebrovascular disease; circulatory and pulmonary diseases; diabetes mellitus; and malignant neoplasms of the prostate and lungs. It is important to note that the main causes of death were non-communicable or lifestyle diseases.

TABLE 20.4
END OF YEAR POPULATION OF JAMAICA BY PARISH, 2010–2014

	End of Year Population 2010	End of Year Population 2011	End of Year Population 2012	End of Year Population 2013	End of Year Population 2014 ^r	% Distribution 2014 ^p
JAMAICA	2 695 500	2 704 100	2 711 500	2 717 900	2 723 200	100.0
Kingston & St. Andrew	662 100	664 200	666 000	667 600	668 900	24.6
St. Thomas	93 800	94 100	94 400	94 600	94 800	3.5
Portland	81 700	82 000	82 200	82 400	82 500	3.0
St. Mary	113 500	113 900	114 200	114 500	114 700	4.2
St. Ann	172 200	172 800	173 200	173 700	174 000	6.4
Trelawny	75 100	75 300	75 600	75 700	75 900	2.8
St. James	183 600	184 200	184 700	185 100	185 500	6.8
Hanover	69 500	69 700	69 900	70 000	70 200	2.6
Westmoreland	144 000	144 400	144 800	145 200	145 500	5.3
St. Elizabeth	150 100	150 600	151 000	151 400	151 600	5.6
Manchester	189 700	190 300	190 800	191 300	191 600	7.0
Clarendon	244 900	245 700	246 300	246 900	247 400	9.1
St. Catherine	515 300	516 900	518 400	519 600	520 600	19.1

r - revised

p - provisional

Source: Statistical Institute of Jamaica.

SPATIAL DISTRIBUTION

For a place to be considered urban it must have a population of 2 000 or more persons and provide a number of amenities and facilities which in Jamaica indicate modern living⁸. The process of urbanization is an intrinsic dimension of economic and social development. The policy statement on internal migration and urbanization in the National Population Policy speaks to “achieving a balance between the spatial distribution of the population and that of development through investment programmes and projects”.

Estimates from the 1991 Population and Housing Census revealed that more persons resided in rural areas (50.4 per cent) relative to urban areas. However, findings from the 2011 Population and Housing Census indicated that approximately 54.0 per cent of the Jamaican population resides in urban areas. The development and growth of urban areas outside of parish capitals is a significant and distinctive feature of Jamaica’s urbanization. Over the years, there has been a noticeable increase in urban centres within the parish of St. Catherine namely, Linstead, Old Harbour and Portmore. The urban centre demonstrating the largest growth between the period was Portmore, increasing to 182 153 in 2011 from 100 200 in 1991. This growth contributed to St. Catherine being the fastest growing parish. In 1991, the town of Black River suffered declines in its population. However, the population grew to 5 332 in 2011 from 3 300 in 1991. Over the inter-censal period, other urban centres that have shown

considerable growth are Bog Walk, Ewarton in St. Catherine; Ocho Rios in St. Ann; Negril in Westmoreland; and Santa Cruz in St. Elizabeth. The 2011 census showed an increase in the proportion of the Jamaican population who live in parish capitals, predominantly the Kingston Metropolitan Area (KMA), Spanish Town, Montego Bay, May Pen and Mandeville. In 2014, the largest proportion of the population was found to be 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}.

Since 1994, the GOJ has made considerable progress in trying to balance spatial distribution and in reducing the push-pull factors of internal migration. These include:

- Major infrastructural development through the construction of highways
- Upgrading of small and medium-sized urban centres such as increased hotel and housing stocks
- Implementation of measures to promote decentralization including programmes to improve infrastructure and human resources
- Strengthening of public private partnerships (PPPs) and the adoption of effective evidence-based policies to plan for urban population growth.

8. STATIN, *Population and Housing Census, 2011: Jamaica, General Report Volume 1* (Kingston: STATIN), 162. The definition emphasizes the link between population and land use, and seeks to ensure that the urban landscape reflects a strong mix of commercial, industrial, residential and other urban land use functions.

INTERNATIONAL MIGRATION

International migration is a complex and multidimensional phenomenon. International migration is defined as the movement of persons, from their country of habitual residence, to establish themselves either permanently or temporarily in another country⁹. Immigration is the process by which non-nationals move into a country for the purpose of settlement while emigration is the act of departing or exiting from one state with a view to settling in another¹⁰. The nature and diversity of migration flows have categorized countries such as Jamaica as countries of origin, destination and transit simultaneously. This presents both opportunities and challenges for countries as well as for the well-being of migrants.

The Population Sector Plan of Vision 2030 Jamaica espouses a state where “international migration is adequately measured, monitored and influenced to serve the development needs of Jamaica”¹¹. In an effort to ensure this, Jamaica has embarked on a process to mainstream migration into development planning to maximize the benefits and mitigate the risks as identified by the ICPD PoA. Some achievements include: the development of a Migration Profile of Jamaica and a draft National Policy and Plan of Action for International Migration and Development.

Emigration¹²

Estimates for 2013 indicate that 24 744 Jamaicans were granted visas for permanent residence in the United States of America (USA), Canada and the United Kingdom (UK) compared with 14 746 Jamaicans in 1994. In relation to the USA, the figure includes Jamaicans who received their visas in Jamaica, those already living in the USA, and those living elsewhere (Table 20.5a).

There was a 40.4 per cent increase in the number of Jamaicans granted visas for permanent residence in the USA, from 14 349 in 1994 to 19 400 in 2013 (see Table 20.5a). In 1995¹³, Jamaica was ranked 9th among countries with the highest number of residents who were granted legal permanent resident status for the USA relative to 2012 (11th position).

Among Latin American and Caribbean countries, Jamaica was ranked 4th, a shift compared with 3rd place in 1995¹⁴.

Emigrants to the USA are admitted based on six categories of admission¹⁵ (Table 20.5b). For this section, the level of disaggregation by category was not available for earlier years. Similar to previous years, family reunification continued to be the main reason for emigration to the USA¹⁶, accounting for 95.9 per cent of the total emigrants in 2014 and 94.5 per cent in 2001. Migrants categorized as “Immediate relatives to US Citizens” accounted for 64.5 per cent, an increase of 10.0 percentage points from 2001. In 2014, emigrants under “Family Sponsored Preferences” remained the second largest category with 31.4 per cent (see Table 20.5b).

There was no data on age, sex and occupational status for Jamaican migrants to the USA at the time of publication.

Canada accounted for 2 470 permanent migrants from Jamaica (see Table 20.5a). The highest proportion of migrants was concentrated in the 30–39 age groups (25.5 per cent) {Table 20.5c}.

Since 2001, the data obtained from Citizenship and Immigration, Canada were classified according to the Jamaica Standard Occupational Classification from STATIN. In 2001, the Professional and Service Related occupational groups were the largest proportion of emigrant workers to Canada, 17.2 per cent and 7.0 per cent, respectively compared with 7.5 per cent and 2.8 per cent in 2013 (Table 20.5d). The continued decline among Craft and Related Trades Workers, from 4.4 per cent in 2001 to 1.8 per cent in 2013, can be attributed to a shift in the demand for highly skilled Jamaican professionals in industries such as health care, financial services and construction. The category of “Non-workers, New workers, Homemakers, Students and Retirees” remained high at 78.5 per cent, a 13.6 percentage point increase from 2001 (see Table 20.5d). The figure for the category “Unknown” for the period grew from 0.2 per cent in 2001 to 8.7 per cent in 2013.

Data on Jamaicans migrating to the **United Kingdom** are collected and recorded by the UK Home Office. Since 2004, British citizenship is offered on two main bases: Entitlement

9. International Organization for Migration, *Glossary on Migration, 2nd Edition* (Geneva: IOM, 2011).

10. Ibid.

11. Planning Institute of Jamaica, *Vision 2030 Jamaica – National Development Plan, Population Sector Plan* (Kingston: PIOJ, 2010).

12. There is a one-year lag in migration data.

13. Earliest data on Legal Permanent Resident Flows.

14. Randall Monger and James Yankay, *US Legal Permanent Residents: 2013 Annual Flow Report* (Office of Immigration Statistics, Policy Directorate, Department of Homeland Security, May 2014).

15. Data was first collected for this section in 2001.

16. 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.

TABLE 20.5a
MAIN STREAMS OF MIGRATION FROM JAMAICA, 2003–2013

YEAR	COUNTRY			
	USA ^a	CANADA ^b	UK ^c	TOTAL
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	2 230 ^r	3 148	27 161 ^r
2010	19 825	2 310 ^r	2 958	25 093 ^r
2011	19 662	2 055 ^r	2 514	24 231 ^r
2012	20 705	2 185 ^r	3 005	25 895 ^r
2013	19 400	2 470	2 874	24 744

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 2003–2013. 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 Citizenship and Immigration Canada, RDM as of January 2015

- Immigration Statistics October-December 2012, February 2013

TABLE 20.5b
JAMAICAN IMMIGRANTS ADMITTED TO THE UNITED STATES OF AMERICA
BY SELECTED CLASS OF ADMISSION, 2010–2013

	NUMBER				PERCENTAGE			
	2010	2011	2012	2013	2010	2011	2012	2013
Family Sponsored Preferences	5 386	6 074	5 818	6 095	27.2	30.9	28.2	31.4
Employment Based Preferences	562	602	589	679	2.8	3.1	2.8	3.5
Immediate Relatives to US Citizens	13 781	12 882	14 193	12 510	69.5	65.7	68.5	64.5
Refugee and Asylee Adjustments	d	6	57	64	0.0	0.0	0.3	0.3
Diversity Programmes	d	d	3	d	0.0	0.0	0.0	0.0
Other	96	58	45	52	0.5	0.3	0.2	0.3
Total	19 825	19 622	20 705	19 400	100.0	100.0	100.0	100.0

d - Disclosure standards not met

Source: Yearbooks of Immigration Statistics 2010, 2011, 2012 and 2013
Office of Immigration Statistics, US Department of Homeland Security.

TABLE 20.5c
PERMANENT RESIDENTS ADMITTED FROM JAMAICA TO CANADA BY AGE, 2010–2013

AGE GROUP	2010 ^r	2011 ^r	2012 ^r	2013
0–4	90	60	70	70
5–9	165	130	160	205
10–14	190	170	185	265
15–19	255	185	185	215
20–24	200	215	195	215
25–29	260	275	265	230
30–34	295	285	295	300
35–39	260	215	260	330
40–44	205	175	210	260
45–49	115	135	135	165
50–54	85	75	75	85
55–59	70	35	60	40
60–64	55	35	40	35
65+	65	65	50	55
TOTAL	2 310	2 055	2 185	2 470
0–4	3.9	2.9	3.2	2.8
5–9	7.1	6.3	7.3	8.3
10–14	8.2	8.3	8.5	10.7
15–19	11.0	9.0	8.5	8.7
20–24	8.7	10.5	8.9	8.7
25–29	11.3	13.4	12.1	9.3
30–34	12.8	13.9	13.5	12.1
35–39	11.3	10.5	11.9	13.4
40–44	8.9	8.5	9.6	10.5
45–49	5.0	6.6	6.2	6.7
50–54	3.7	3.6	3.4	3.4
55–59	3.0	1.7	2.7	1.6
60–64	2.4	1.7	1.8	1.4
65+	2.8	3.2	2.3	2.2
TOTAL	100.0	100.0	100.0	100.0

r - revised

Source: Citizenship and Immigration, Canada, RDM as of January 2015

and Discretionary¹⁷. However, in 1994, emigrants to the UK were categorized into six groups: Wives; Husband; Children under 18; Returning Residents; Other for Settlement; and Certificates of Entitlement.

Approximately, 334 Jamaicans were granted British Citizenship¹⁸ in 1994 compared with 2 874 in 2013 (Table 20.5e). In 1994, the majority of those who received British Citizenship was Children under 18 and Husbands, 38.3 per cent and 24.2 per cent, respectively. However, in 2013, the largest proportions were granted on the grounds of Residence and Marriage, 48.8 per cent and 20.2 per cent, respectively. Minor children continued to reflect the highest proportion of those being granted permanent residency on a Discretionary basis.

Immigration

There are different classes of immigrants: Returned Residents; Involuntary Returned Migrants; Commonwealth Citizens; and Aliens. Immigrants play a pivotal role in enhancing and fostering development. The contributions made through their investment in human, social, financial and cultural capital are an asset for development.

Returned Residents (Voluntary)

The number of Returned Residents totalled 2 587 in 1994 compared with 762 in 2014. The largest decline over the period was evident in the UK, from 1 145 to 162. In 2014, the majority came from the USA (50.1 per cent) and the UK (21.3 per cent). Canada continued to record the lowest declines (Table 20.5f).

17. 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. See UK Home Office, *User Guide to Home Office Immigration Statistics* (February 23, 2012).

18. UK Home Office, Control of Immigration: Statistics United Kingdom April–June 2014 (Home Office Statistical Bulletin, March 2015).

TABLE 20.5d
MIGRANTS FROM JAMAICA TO CANADA BY OCCUPATION, 2009–2013

OCCUPATION GROUP	2009 ^r	2010 ^r	2011 ^r	2012 ^r	2013
Professionals, Senior Officials and Technicians	235	235	165	150	185
Clerks	30	25	35	5	5
Service Workers and Shop and Market Sales Workers	130	100	115	55	70
Skilled Agricultural and Fishery Workers	5	10	20	5	0
Craft and Related Trades Workers	70	85	90	35	45
Plant and Machine Operators and Assemblers	10	25	35	0	0
Elementary Occupations	40	50	25	15	10
Non-workers, New Workers, Homemakers, Students and Retirees	1 515	1 453	1 255	1 640	1 940
Unknown	195	327	315	280	215
TOTAL	2 230	2 310	2 055	2 185	2 470
Professionals, Senior Officials and Technicians	8.2	4.9	5.4	5.1	7.5
Clerks	1.5	1.1	1.7	0.2	0.2
Service Workers and Shop and Market Sales Workers	6.7	5.1	7.4	4.0	2.8
Skilled Agricultural and Fishery Workers	1.5	1.8	2.2	0.9	0.0
Craft and Related Trades Workers	4.0	5.3	5.2	2.1	1.8
Plant and Machine Operators and Assemblers	0.4	1.1	1.7	0.0	0.0
Elementary Occupations	0.2	0.0	0.0	0.0	0.4
Non-workers, New Workers, Homemakers, Students and Retirees	63.7	62.8	61.5	75.3	78.5
Unknown	13.9	17.9	14.8	12.3	8.7
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*.

r - revised

Note: The data obtained from Citizenship and Immigration, Canada were classified according to the Jamaica Standard Occupational Classification, STATIN

Source: Citizenship and Immigration Canada, RDM as of January 2015

TABLE 20.5e
JAMAICANS RECEIVING BRITISH CITIZENSHIP BY TYPE, 2007–2013

YEAR	RESIDENCE	MARRIAGE	ENTITLEMENT			DISCRETIONARY			Total
			Adult	Minor Children	Other	Adult	Minor Children	Other	
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
2013	1 401	581	0	262	267	0	363	0	2 874
PERCENTAGE									
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
2013	48.8	20.2	0.0	9.1	9.3	0.0	12.6	0.0	100.0

Source: Control of Immigration Statistics: United Kingdom 2013, March 2015. Home Office Statistical Bulletin, Home Office

Involuntary Returned Migrants (Deportees)

Through the last decade, the situation of involuntary returned migrants has become a prominent issue. The government has sought to implement measures which limit or stem the negative consequences of this subgroup through policies, plans and programmes.

The *ESSJ* first recorded data on Involuntary Returned Migrants or “deportees” in 1995. Estimates for 2014 revealed that there was an increase in the number of Involuntary Returned Migrants since 1995, from 1 582 to 1 984. The largest decline (18.2 per cent) over the period was reported from the USA. There has also been a gradual decrease in involuntary returned migrants from Canada, from 382 to 218 over the same period (see Table 20.5f). There was no data

on age, sex and type of offence in 1995. However, in 2013, further disaggregation of data on deported persons by age, show that approximately 83.9 per cent were males between the ages of 36–40 years. Among females, 19.4 per cent was in the 26–30 age range. The majority of involuntary returned migrants was deported on the basis of Overstay/Illegal Entry/Re-Entry, and Drugs, 45.3 per cent and 27.8 per cent, respectively (see chapter on National Security and Justice).

Commonwealth Citizens and Aliens

Similar to the Involuntary Returned Migrant category, the *ESSJ* commenced recording data in the Commonwealth Citizens and Aliens category in 1998. The number of Commonwealth Citizens issued extension beyond six months increased to 3 507 in 2014 from 2 153 in 1998. There was also

TABLE 20.5f
JAMAICAN RETURNED RESIDENTS AND INVOLUNTARY RETURNED MIGRANTS, 2010–2014

YEAR	RETURNED RESIDENTS					INVOLUNTARY RETURNED MIGRANTS				
	USA	CANADA	UK	OTHER	TOTAL	USA	CANADA	UK	OTHER	TOTAL
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
2014	382	108	162	110	762	833	218	290	643	1 984

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

r - revised

Source: Jamaica Constabulary Force, Police Statistics Department
Jamaica Customs

TABLE 20.5g
IMMIGRATION TO JAMAICA, 2010–2014

YEARS	RETURNED RESIDENTS	INVOLUNTARY RETURNED MIGRANTS	COMMONWEALTH CITIZENS	ALIENS	TOTAL
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	5 457	12 149 ^r
2013	839	2 139	3 165	7 289	13 432 ^r
2014	762	1 984	3 507	8 174	14 427 ^p

r - revised

p - provisional

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.

TABLE 20.5h
APPROVED APPLICATIONS OF CSME CERTIFICATES FOR JAMAICANS AND NON-JAMAICANS, 2007–2014

	2007	2008	2009	2010	2011	2012	2013	2014	TOTAL
JAMAICANS	82	92	45	105	76	78	204	391	1 073
NON-JAMAICANS	43	29	17	13	10	27	24	19	182
TOTAL	255	379	273	332	86	105	228	410	1 255

Source: Work Permits Department, Ministry of Labour and Social Security

TABLE 20.5i
APPROVED APPLICATIONS OF CSME CERTIFICATES FOR JAMAICANS BY SEX, 2007–2014

	2007	2008	2009	2010	2011	2012	2013	2014	TOTAL
MALE	39	52	22	43	31	46	105	194	532
FEMALE	43	40	23	62	45	32	99	197	541
TOTAL	82	92	45	105	76	78	204	391	1 073

Source: Work Permits Department, Ministry of Labour and Social Security

an increase in the proportion of persons registered as Aliens (non-Commonwealth Citizens), to 8 174 in 2014 from 942 in 1998 (see Table 20.5g).

Caribbean Single Market and Economy (CSME) Certificates

The CARICOM (Free Movement) Skilled Persons Act came into effect in July 1997. The Act allows for the free movement of Caribbean professionals within the Caribbean. Individuals who qualify under the Act receive a “Certificate of Recognition of Caribbean Community Skilled Person”. Data on approved application for CSME certificates are disseminated by the Work Permits Department of the Ministry of Labour and Social Security (MLSS).

Of the 1 255 persons receiving certificates for the period 2007 to 2014, approximately 85.5 per cent was Jamaican (Table 20.5h). It must be noted that acquiring a certificate does not necessarily reflect those who leave within the year or the period. In 2014, there was an increase in the number of Jamaicans receiving approved applications relative to 2013 (91.7 per cent). The increase in the number of Jamaicans can be attributed to persons who are potentially seeking employment in CARICOM. Data further revealed that females represented 50.8 per cent of those who obtained a certificate (Table 20.5i).

POPULATION AND DEVELOPMENT

During the year, efforts were made to integrate population and development concerns in the formulation of national and sectoral policies, plans and programmes. These include: the

launch of the International Conference on Population and Development (ICPD) National Report; development of a National Outcome Document for the Post-2015 Development Agenda; mainstreaming migration into development; the Global Forum on Migration and Development (GFMD); Diaspora Mapping Project; and the modernization programme of the Civil Registration and Vital Statistics System (CRVS).

Launch of the International Conference on Population and Development (ICPD) National Report

The ICPD National Report was launched at the National Centre for Youth Development/National Youth Service in May Pen on World Population Day, July 11, under the theme “Investing in Youth”. The National Report reflects global consensus on principles, objectives and actions in the area of population and development between 1994 and 2014. It also includes priority actions for inclusion at the national level for the post-2015 agenda for full implementation of the Programme of Action (PoA).

The implementation of the ICPD PoA marked a global commitment to effectively incorporate population issues into socio-economic development planning and strategies. The PoA took into consideration the interrelationship of population issues with goals of poverty eradication, food security, adequate shelter, the integration of family planning into reproductive health services aimed at improving maternal and child health, gender equality and equity and prevention of HIV/AIDS and other STIs. The primary objective was to ensure improvement in the quality of life of present and future

generations through appropriate population and development policies and programmes. The major achievements highlighted in the Report and reinforced in earlier sections of the chapter include:

- Revision of the National Population Policy (1995) and formulation of a PoA on Population and Development consistent with the ICPD PoA (1995)
- Significant progress in legislation and policy reforms relating to children; adolescents; youth; elderly; persons with disabilities; trafficking in persons; sexual offences; and international migration and development
- Reduction in population growth
- Reduction in fertility among all reproductive age groups, including adolescents
- Improvements in life expectancy at birth to 74.1 years
- A draft National Policy and Plan of Action on International Migration and Development, and a draft Diaspora Policy
- Reduction in mother-to-child transmission of HIV and deaths due to HIV/AIDS
- Reduction in infant, child and maternal mortality
- Universal access to quality and affordable health services.

Priority areas were also identified for inclusion in the Post-2015 Development Agenda. Some of these included:

- Stronger focus on sustainable development
- Continuing focus on reduction in fertility among adolescents and youth
- Renewed effort in addressing infant, child and maternal mortality and HIV/AIDS
- Ensuring the integration of population ageing in all development policies, plans and programmes
- Incorporating population growth and distribution in urbanization and climate change policies and planning
- Mainstreaming international migration into national development and the role of the Diaspora in national development
- Ensuring that human rights and gender issues are integrated into all policies, plans and programmes
- Significant progress in legislation and policy reforms relating to children, adolescents, youth, elderly, persons with disabilities, trafficking in persons, sexual offences, international migration and development and in the area of human rights

- Assignment of portfolio responsibility for family well-being.

Post-2015 Development Agenda

Countries began the engagement of an inter-governmental process to identify sustainable development goals for the Post-2015 Development Agenda. This process has drawn on the successes, failures and lessons learnt from the implementation of, inter alia, the Millennium Development Goals (MDGs); ICPD PoA; Beijing Social Summit; Agenda of the Small Island Developing States (SIDS); and Convention on the Elimination of Discrimination against Women (CEDAW). The development of the Post-2015 Development Agenda is a state-led process which encourages consultations among stakeholders to ensure no one is left behind. The Open Working group (OWG) consisting of a panel of high level experts commissioned by the Secretary General of the United Nations was charged with the responsibility of identifying sustainable development goals and their attendant targets for the Post-2015 Development Agenda. The proposed goals are to:

- End poverty in all its forms everywhere
- End hunger, achieve food security and nutrition, and promote sustainable agriculture
- Attain healthy lives for all at all ages
- Provide inclusive and equitable quality education and life-long learning opportunities for all
- Achieve gender equality and empower all women and girls everywhere
- Ensure availability and sustainable management of water and sanitation for all
- Ensure access to affordable, sustainable, and modern energy for all
- Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all
- Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- Reduce inequality within and among countries
- Make cities and human settlements inclusive, safe and sustainable
- Ensure sustainable consumption and production patterns
- Take urgent action to combat climate change and its impacts
- Conserve and sustainably use the oceans, seas and marine resources for sustainable development

- Protect, restore and promote sustainable use of territorial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
- Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
- Strengthen the means of implementation and revitalize the global partnership for sustainable development.

A process was undertaken to outline Jamaica's position on this new global development framework. An Inter-Ministerial Working Group was established led by the PIOJ and the Ministry of Foreign Affairs and Foreign Trade (MFAFT) to facilitate the process. In April 2014, Jamaica commenced national consultations on the refinement of the proposed goals and targets. The result was a draft National Outcome Document embodying the goals, outcomes, strategies and priority actions of Vision 2030 Jamaica.

Mainstreaming Migration into Development Planning

The process of mainstreaming migration into development planning is relatively new. It is described as “the process of assessing the implications of migration on any action (or goals) planned in a development and poverty reduction strategy”¹⁹. This signifies that migration and development (M&D) should be incorporated into legislation, policies, plans and programmes at regional, national and local levels as well as integrated at all stages of development.

Jamaica was selected as one of eight countries in Phase 2 of a joint global programme. Special focus was placed on providing greater institutional and policy coherence and capacity development in order to implement the national priorities in international migration and development (IMD). Some of the major activities were:

- Participation in South to South Dialogue with Cape Verde government officials
- Presentation of amended draft National Policy and Plan of Action on IMD to the International Trade and Human Resources sub-committees of Cabinet
- Collaboration with the Statistical Institute of Jamaica (STATIN) in commencing the design of a National Migration Database and finalization of metadata sheets
- Collaboration with the MFAFT in the formulation of the draft Diaspora Policy and planning of the 6th Biennial Diaspora Conference

- Increased national and international visibility through presentations made locally and internationally on Jamaica's efforts in mainstreaming migration and development.

Jamaica participated in the 7th **Global Forum on Migration and Development** (GFMD) held in Stockholm, Sweden, May 14–16, under the theme “Unlocking the Potential of Migration for Inclusive Development”. There were four round table discussions centred on migration as an enabler for inclusive social and economic development. The areas of focus were:

- Integrating migration in global, regional and national development agendas
- Migration as an enabler for inclusive economic development
- Migration as an enabler for inclusive social development.

Recommendations emanating from the meeting included efforts to:

- Share countries' experiences and build partnerships on M&D issues
- Continue to build on the strong cooperation with civil society, by giving consideration to increased cooperation with diaspora and youth organizations
- Build on and strengthen the format for engaging the private sector.

Diaspora Mapping Project

The GOJ, through the MFAFT, in collaboration with the International Organization for Migration (IOM) conducted a Mapping Exercise of Jamaicans abroad aimed at collecting more timely, reliable, and accurate data and information on the Diaspora.

The Mapping Project²⁰ was launched in several locations in June and July in Kingston, Jamaica; Birmingham and London in the United Kingdom; and Toronto, Canada respectively. Launches were also conducted in major Diaspora centres in the North-Eastern and South-Eastern United States. The expected duration of the project is 18 months and takes the form of an online survey geared towards identifying locations, skills, expertise and interests of members of the global Jamaica Diaspora.

19. *Mainstreaming Migration into Development Planning: A Handbook for Policy-makers and Practitioners*: Global Migration Group (Denmark, IOM: 2010).

20. To participate in the survey visit the following website: www.mapj diaspora.iom.int

Modernization Programme of the Civil Registration and Vital Statistics System

The Vital Statistics Commission continued its mandate to implement activities to improve the quality, accuracy, reliability and timeliness of data from the civil registration vital statistics system (CRVS). Emphasis was placed on providing technical advice and building capacity among institutions. Efforts continued through the implementation of modernization programmes of the CRVS through the following activities:

- Study Tour on national identity in Ecuador to view their Identification and Civil Registration systems as well as to attend workshops on Identity Policies and Civil Registration
- Development of a TOR for strategic review of the Registrar General’s Department (RGD) which seeks to further modernize the entity by way of improving the collection of vital data.

OUTLOOK

In 2015, Jamaica will begin the process to revise the National Population Policy. The Policy was last revised in 1995. This revision will reflect the changing demographic situation of Jamaica and identify relevant goals and priorities.

In April 2015, consultations will commence to finalize the sustainable development goals and identify indicators for the Post-2015 Development Agenda. The Post-2015 Development Agenda will be adopted in September 2015 at the UN Heads of Summit.

Jamaica is expected to participate in the 8th Global Forum on Migration and Development scheduled to take place in Istanbul, Turkey, October 14–16, 2015. The overarching theme of the event is “Strengthening Partnerships: Human Mobility for Sustainable Development”. Three roundtables, each with two sessions, will expand on the main theme.

UNFPA will provide financial and technical support to the Ministry of Health (MOH) and NFPB towards the development of the National Sexual and Reproductive Health Policy for Jamaica. The process will begin with the establishment of a SRH Policy Steering Committee comprising MDAs, private sector and civil society organizations (CSOs). This is the first comprehensive policy on SRH for Jamaica.

Complete the Quality and Completeness of Death Registration: Jamaica 2008 which highlights and outlines recommendations for the improvement of death registration in the relevant MDAs.

The PIOJ will host the Global Project Board meeting for Phase 2 of the Mainstreaming Migration into Development Planning. The Global Project Board facilitates dialogue and exchanges among partner countries; promotes synergies; and ensures visibility of migration and development issues at the global level.

The MFAFT will be hosting the 6th Biennial Diaspora Conference at the Montego Bay Convention Centre, Montego Bay from June 13 to 18, 2015 under the theme “Jamaica and the Diaspora: Linking for Growth and Prosperity”. The conference will focus on Investment and Trade, and Social Services. ■

THE LABOUR MARKET

INTRODUCTION

The Jamaican labour market showed signs of recovery amidst instability in the overall global market, as the International Labour Organization (ILO) reports¹ that globally, unemployment remained high with approximately 201.3 million persons being unemployed, 31.0 million more than in 2007 (the start of the global economic crises) and 1.2 million more than in 2013². The year 2014 represented the highest employment level since 2008, with economic growth in specific areas such as Construction, Mining & Quarrying, Transport, Storage & Communication, Hotels & Restaurants, and Financial Intermediation. The focus on achieving growth and job creation remained a priority throughout the year, with renewed focus on labour market reform. 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 2012–2015, the International Labour Organization’s Decent Work Agenda and the Government of Jamaica’s Growth Agenda.

The labour force exhibited a 0.01 per cent decline to 1 307 725, with males (54.7 per cent) outnumbering females. Despite a widening in the employment gap³ globally⁴, average employment locally grew by 1.7 per cent to 1 128 050 persons in 2014. Conversely, the local labour market showed signs of rebound as unemployment fell from 199 550 to 179 675 persons. Both youth and adult unemployment rates trended down, from 37.7 per cent and 11.6 per cent to 34.2 per cent and 10.1 per cent, respectively, with female unemployment remaining higher.

The positive performance of the labour market was further highlighted by the increase in employment, compared with 2013, in both the Services and Goods Producing Industries of 1.9 per cent and 1.4 per cent, respectively. There was a

reversal in the performance of the Construction industry which showed reduced employment by 2.5 per cent, resulting partly from a decline in the domestic housing market (see chapter on Construction).

It was reported that 773 950 persons remained outside the labour force for various reasons, with 60.4 per cent of those persons being female. The percentage of persons in the labour force without training was 70.2 per cent. Of this amount, males accounted for 60.3 per cent.

The Employment (Flexible Work Arrangements) (Miscellaneous Provisions) Act 2014 was passed by both Houses of Parliament and became effective in November. This resulted in the amendment of 24 pieces of legislation toward the implementation of flexible work arrangements in Jamaica.

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 declined by 750 persons to 1 307 725 (Table 21.1). This downward shift can be attributed to a decline in the number

1. ILO estimates for 2015 are preliminary.

2. International Labour Office, *World Employment and Social Outlook: Trends 2015* (Geneva: International Labour Organization, 2015).

3. The global employment gap refers to the number of jobs lost since the start of the crisis (2007) and 2014.

4. International Labour Office, *World Employment and Social Outlook: Trends 2015*.

TABLE 21.1
MAIN LABOUR FORCE INDICATORS BY SEX, 2013–2014
(‘000)

MAIN INDICATOR	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
BOTH SEXES										
Labour Force	1 297.6	1 322.4	1 309.4	1 304.5	1 308.5	1 305.1	1 311.1	1 304	1 310.7	1 307.7
Employed Labour Force	1 110.0	1 107.3	1 107.9	1 110.5	1 108.9	1 130.1	1 133.0	1 124.6	1 124.5	1 128.1
Unemployed Labour Force	187.5	215.1	201.6	194.0	199.5	175.0	178.1	179.4	186.2	179.7
Unemployment Rate (%)	14.5	16.3	15.4	14.9	15.2	13.4	13.6	13.8	14.2	13.7
Job-Seeking Rate (%)	9.5	10.0	9.7	9.9	9.8	9.0	9.4	8.4	9.3	9.0
Labour Force Participation Rate	62.5	63.7	63.0	62.8	63.0	62.8	63.0	62.6	62.9	63.0
MALE										
Labour Force	708.7	716.1	715.6	713.5	713.5	716.5	716.0	711.1	717.0	715.2
Employed Labour Force	633.5	630.2	632.0	637.7	633.4	643.8	641.5	640.6	645.9	643.0
Unemployed Labour Force	75.2	85.9	83.6	75.8	80.1	72.7	74.5	70.5	71.1	72.2
Unemployment Rate (%)	10.6	12.0	11.7	10.6	11.0	10.1	10.4	9.9	9.9	10.1
Job-Seeking Rate (%)	7.3	8.0	7.6	7.2	8.0	7.2	7.4	6.3	7.1	7.0
Labour Force Participation Rate	69.6	70.3	70.2	70.0	70.0	70.2	70.1	69.6	70.1	70.0
FEMALE										
Labour Force	588.9	606.3	593.8	591.0	595.0	588.6	595.1	592.9	593.7	592.6
Employed Labour Force	476.5	477.1	475.9	472.8	475.6	486.3	491.5	484.0	478.6	485.1
Unemployed Labour Force	112.3	129.2	118.0	118.2	119.4	102.3	103.6	108.9	115.1	107.5
Unemployment Rate (%)	19.1	21.3	19.9	20.0	20.1	17.4	17.4	18.4	19.4	18.1
Job-Seeking Rate (%)	12.4	12.5	12.3	13.2	12.6	11.2	11.9	11.1	12.1	11.6
Labour Force Participation Rate	55.7	57.3	56.1	55.8	56.3	55.6	56.1	55.9	55.9	55.9

Note: Discrepancies are due to rounding

p - preliminary

r - revised

Source: Statistical Institute of Jamaica

of youth and females in the labour force. Females continued to be less represented in the total labour force, comprising 45.3 per cent. A higher percentage of females compared with males remained outside the labour force for varying reasons.

The labour force participation rate⁵ remained at approximately 63.0 per cent. Both the male and female participation rates remained at 70.0 per cent and 55.9 per cent, respectively. The labour force continued to be comprised mainly of persons within the 25–34 and the 35–44 age groups (Table 21.2). Persons in the prime working age group (25–54 years) accounted for 69.8 per cent of the total labour force. The number of adult participants (25 years and over) increased by 0.6 per cent to 1 112 375 persons while the number of youth (14–24 years)⁶ in the labour force declined by 3.6 per cent to 195 350.

Persons outside the labour force⁷ totalled 773 950, an increase of 0.7 per cent relative to 2013. The persons outside the labour force were concentrated mainly in two categories—those that reported they “Did Not Want to Work” (57.6 per cent) and those that reported being “At School Full Time” (26.7 per cent). Females accounted for the majority (60.4 per cent) of persons outside the labour force due to “Staying Home with Dependents” (20 500) or being “Pregnant” (2 300). Of the 446 050 persons reporting that they “Did not want to work”, 64.6 per cent was female. Other reasons for persons being outside the labour force included being “Incapable of Working” (6.8 per cent), and suffering from “Illness” (2.1 per cent). Persons outside the labour force were primarily in the 14–24 (50.5 per cent) and the 25–64 age groups (28.8 per cent).

5. The Labour Force Participation Rate is the labour force as a percentage of the working age population (14 years and over).

6. 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.

7. 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, 2013–2014
(’000)

AGE	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
BOTH SEXES										
TOTAL	1 297.6	1 322.4	1 309.4	1 304.5	1 308.5	1 305.1	1 311.1	1 304.0	1 310.7	1 307.7
14–19	39.8	41.4	34.2	35.5	37.7	34.9	34.5	34.5	34.9	34.7
20–24	155.9	169.7	171.1	163.6	165.1	159.9	162.0	159.1	161.6	160.7
25–34	341.8	346.0	344.6	345.9	344.6	349.0	344.8	346.4	348.7	347.2
35–44	310.7	317.7	317.3	313.2	314.7	309.8	315.6	316.2	315.3	314.2
45–54	251.5	251.3	255.8	251.4	252.5	251.9	251.6	250.7	252.9	251.8
55–64	136.0	134.9	129.0	131.1	132.8	133.6	137.4	137.1	133.9	135.5
65 and over	61.9	61.4	57.4	63.8	61.1	66.0	65.2	60.0	63.4	63.7
MALE										
TOTAL	708.7	716.1	715.6	713.5	713.5	716.5	716.0	711.1	717.0	715.2
14–19	23.0	25.4	21.5	22.2	23.0	22.7	21.9	20.0	20.6	21.3
20–24	88.6	92.8	96.8	91.9	92.5	90.0	92.4	91.1	92.7	91.6
25–34	179.4	179.2	179.6	180.1	179.6	180.5	180.5	180.9	181.8	180.9
35–44	156.9	161.5	161.9	160.0	160.0	161.1	159.8	160.5	160.8	160.6
45–54	137.3	136.1	138.4	136.2	137.0	137.5	137.0	137.0	137.1	137.2
55–64	81.5	79.5	78.4	78.9	79.6	78.7	79.9	80.4	79.8	79.7
65 and over	42.0	41.6	39.0	44.2	41.7	46.0	44.5	41.2	44.2	44.0
FEMALE										
TOTAL	588.9	606.3	593.8	591.0	595.0	588.6	595.1	592.9	593.7	592.6
14–19	16.8	16.0	12.7	13.3	14.7	12.2	12.6	14.5	14.3	13.4
20–24	67.3	76.9	74.3	71.7	72.6	69.9	69.6	68.0	68.9	69.1
25–34	162.4	166.8	165.0	165.8	165.0	168.5	164.3	165.5	166.9	166.3
35–44	153.8	156.2	155.4	153.2	154.7	148.7	155.8	155.7	154.5	153.7
45–54	114.2	115.2	117.4	115.2	115.5	114.4	114.6	113.7	115.8	114.6
55–64	54.5	55.4	50.6	52.2	53.2	54.9	57.5	56.7	54.1	55.8
65 and over	19.9	19.8	18.4	19.6	19.4	20.0	20.7	18.8	19.2	19.7

Note: Discrepancies are due to rounding

p - preliminary

r - revised

Source: Statistical Institute of Jamaica

The quality of the labour force is demonstrated by the number of trained persons and the level of training received by those persons. Overall, 74.5 per cent of the labour force reported having received no training relative to 69.8 per cent in 2013. The number of persons who reported being in the category Professionals with a Degree or Diploma increased to 177 850 from 176 125, compared with 8 000 being Professionals without a Degree or Diploma. Persons with Vocational Training certification numbered 144 450 (11.0 per cent), while 56 025 (4.3 per cent) received On-the-Job training. To address the high number of persons in the labour force without certification, the HEART Trust/NTA launched two new Workforce Colleges while putting steps in place to expand training opportunities in emerging areas such as logistics, maritime and aviation, to meet the training needs of the labour market (see chapter on Education and Training).

Of the 891 725 persons without training, males (60.3 per cent) continued to outnumber females. Female Professionals with Degree or Diploma (113 400) however, outnumbered their male counterparts (64 450). Similarly, females with Vocational certification (84 175) surpassed males with Vocational certification (60 275).

Employment

Employment creation remained a priority as employment levels continued to lag behind the pre-crisis level⁸ (Figure 21A). Annual average employment grew by 1.7 per cent to 1 128 050 persons, resulting in an employment rate of 86.0 per cent. Both the male and female employed labour force increased by 9 600 and 9 525 persons, respectively (Table 21.3). Males continued to represent the majority in the labour force (56.9 per cent).

8. While local GDP started to decline in 2008, employment levels showed a downturn in 2009.

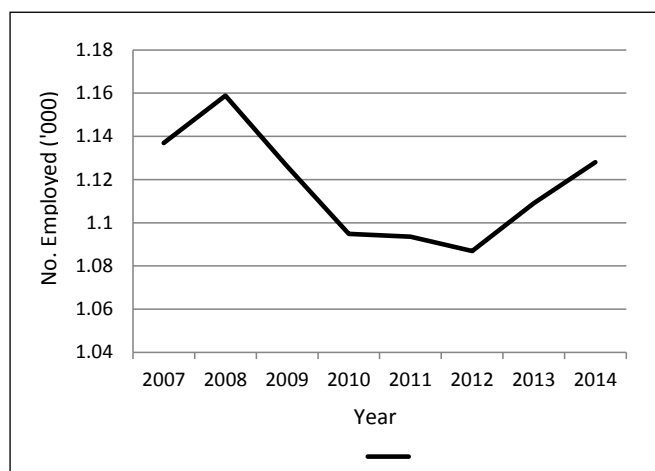


FIGURE 21A: EMPLOYED LABOUR FORCE 2007–2014

Employment by Age and Sex

During the year, the number of employed youth grew by 1.6 per cent to 128 325. Employed male and female youth also increased, by 1.6 per cent and 1.5 per cent to 82 275 and 46 050 persons, respectively.

Employment among adults (25 years and over) averaged 999 725, an increase from 982 700. The group showing the largest increase was the 25–34 age group followed by those

65 years and over which increased by 5 175 and 3 400, respectively. Both males and females showed increases across all the age groups, with employment being consistently higher in the 25–34 age group.

Employment by Employment Status

Similar to 2013, the number of Paid Government Employees declined by 12.9 per cent to 145 950. This is likely due to efforts to reduce the number of public sector workers through attrition or the elimination of vacant posts from the establishment as the government moves to reduce the wage bill as a percentage of Gross Domestic Product. The number of persons employed in the private sector (Paid Non-Government Employee, Unpaid Worker, Employer, and Own Account Worker) increased by 2.1 per cent despite a reduction in the number of Unpaid Workers and Employers. The ratio of private sector worker to public sector worker was approximately 6.7:1.

Females accounted for 60.2 per cent of public sector workers while males accounted for 59.5 per cent of the private sector. Increases were recorded in the Paid Non-Government and Own Account Worker categories, by 3.0 per cent and 1.6 per cent to 523 600 and 408 300, respectively. The Paid Non-Government Employee category accounted for the largest proportion of employed persons with 46.4 per cent followed by Own Account Workers with 36.2 per cent.

TABLE 21.3
EMPLOYED LABOUR FORCE BY AGE GROUP AND SEX, 2013–2014
('000)

SEX AND AGE	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
MALE	633.5	630.2	632.0	637.7	633.4	643.8	641.5	640.6	645.9	643.0
Youth (14–24 yrs.)	79.3	82.5	83.5	78.3	80.9	81.6	84.3	80.9	82.3	82.3
Adults (25 yrs. and over)	554.2	547.7	548.5	559.4	552.5	562.2	557.2	559.7	563.6	560.7
25–34	160.6	155.6	155.9	161.7	158.5	160.3	160.2	162.1	160.9	160.9
35–44	145.9	149.9	152.0	150.3	149.5	150.3	148.8	151.4	151.2	150.4
45 yrs. and over	247.7	242.2	240.6	247.4	244.5	251.6	248.2	246.2	251.5	249.4
FEMALE	476.5	477.1	475.9	472.8	475.6	486.3	491.5	484.0	478.6	485.1
Youth (14–24 yrs.)	45.2	47.3	43.2	45.6	45.3	48.4	46.0	46.5	43.3	46.1
Adults (25 yrs. and over)	431.3	429.8	432.7	427.2	430.3	437.9	445.5	437.5	435.3	439.1
25–34	126.9	126.9	130.3	128.3	128.1	133.1	130.9	127.7	131.7	130.9
35–44	130.9	132.6	131.6	129.1	131.1	128.7	135.5	135.5	131.4	132.8
45 yrs. and over	173.5	170.3	170.8	169.8	171.1	176.1	179.1	174.3	172.2	175.4
TOTAL	1 110	1 107.3	1 107.9	1 110.5	1 108.9	1 130.1	1 133	1 124.6	1 124.5	1 128.05

Note: Discrepancies are due to rounding

p - preliminary

r - revised

TABLE 21.4
EMPLOYED LABOUR FORCE BY EMPLOYMENT STATUS, 2013–2014
(’000)

EMPLOYMENT STATUS	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
Paid Government Employee	145.4	145.5	147.8	148.1	146.7	146.8	145.0	148.0	144.0	146.0
Paid Non-Government Employee	502.9	509.5	507.0	513.2	508.2	522.9	523.8	523.6	524.1	523.6
Unpaid Worker	15.2	15.1	13.3	12.4	14.0	10.6	16.3	16.5	12.4	14.0
Employer	37.2	34.2	34.1	32.6	34.5	32.5	36.6	33.3	30.5	33.2
Own Account Worker	401.7	399.8	402.8	401.9	401.6	415.6	407.0	399.4	411.2	408.3
Not Reported	7.6	3.2	2.9	2.3	4.0	1.7	4.3	3.8	2.3	3.0
TOTAL	1 110.0	1 107.3	1 107.9	1 110.5	1 108.9	1 130.1	1 133.0	1 124.6	1 124.5	1 128.1

Note: Discrepancies are due to rounding

p - preliminary

r - revised

Source: Statistical Institute of Jamaica

TABLE 21.5
EMPLOYED LABOUR FORCE BY INDUSTRY, 2013–2014
(’000)

	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
I GOODS PRODUCING INDUSTRY	362.6	363.6	361.1	363.2	362.7	367.2	369.5	365.3	369.3	367.8
Agriculture, Hunting, Forestry & Fishing	200.9	205.9	202.7	199.9	202.4	207.1	210.2	206.4	207.7	207.9
Mining & Quarrying	5.3	4.7	5.4	6.2	5.4	6.9	5.8	5.3	6.6	6.2
Manufacturing	74.8	70.8	68.2	73.6	71.9	71.7	77.3	70.3	72.3	72.9
Construction	81.6	82.2	84.8	83.5	83.0	81.5	76.2	83.3	82.7	80.9
II SERVICES INDUSTRY	742.7	740.8	745.6	744.6	743.1	759.8	761.5	755.6	752.8	757.6
Electricity, Gas & Water Supply	8.3	7.8	8.7	9.0	8.5	8.0	9.5	8.7	7.8	8.5
Wholesale & Retail, Repair of Motor Vehicle & Equipment	226.5	234.1	213.4	212.1	221.5	233.2	232.2	216.5	223.8	226.4
Hotels & Restaurant Services	79.7	68.1	74.9	80.3	75.8	80.7	77.2	82.7	81.4	80.5
Transport, Storage & Communication	72.3	69.7	75.0	73.6	72.7	71.6	77.0	76.4	76.0	75.3
Financial Intermediation	26.1	28.6	24.6	24.7	26.0	26.2	29.1	25.0	23.9	26.1
Real Estate, Renting & Business Activities	62.1	64.9	69.9	66.6	65.9	70.6	69.9	64.4	64.5	67.4
Public Administration & Defence;										
Compulsory Social Security	55.2	53.6	61.0	56.8	56.7	57.2	57.7	57.5	55.0	56.9
Education	70.6	72.1	68.0	73.8	71.1	70.0	63.7	73.0	74.5	70.3
Health & Social Work	30.8	31.0	34.1	34.6	32.6	32.6	30.6	33.4	31.1	31.9
Other Community, Social and Personal Service Activities	55.3	56.9	59.9	59.7	58.0	54.2	59.0	63.8	57.9	58.7
Private Households with Employed Persons	55.8	54.0	56.1	53.4	54.8	55.5	55.6	54.2	56.9	55.6
III INDUSTRY NOT SPECIFIED	4.7	2.9	1.2	2.7	2.9	3.1	2.0	3.7	2.4	2.8
TOTAL	1 110	1 107.3	1 107.9	1 110.5	1 108.9	1 130.1	1 133	1 124.6	1 124.5	1 128.1

Note: Discrepancies are due to rounding

p - preliminary

r - revised

Source: Statistical Institute of Jamaica

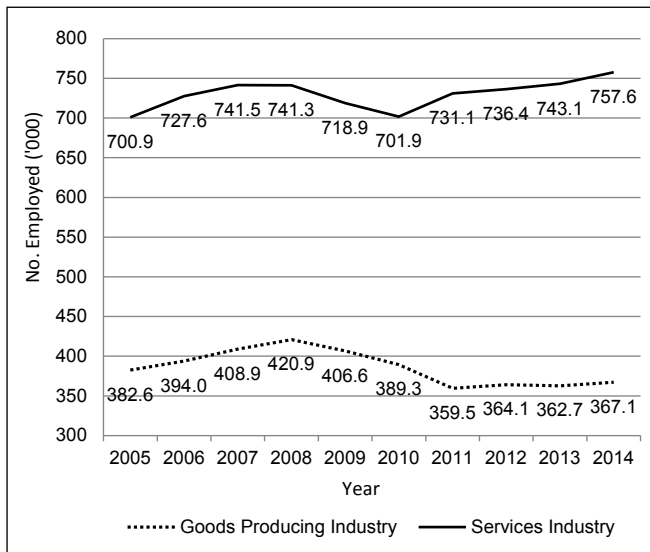


FIGURE 21B: EMPLOYED LABOUR FORCE BY INDUSTRY, 2005–2014

Employment by Industry

Employment in the Services Industry has surpassed its pre-crisis (2008) level while employment in the Goods Producing Industry remained below its 2008 level (Figure 21B), reflecting the continued underperformance within the Goods Producing Industry (See chapter on Gross Domestic Product). Average annual employment increased as a result of growth of 1.9 per cent and 1.4 per cent in the Services and Goods Producing Industries, respectively (Table 21.5). The Goods Producing Industry accounted for 32.6 per cent of employment with increases occurring in all but one sub-industry. Employment increased in Agriculture, Hunting,

Forestry & Fishing by 2.7 per cent to 207 850; Manufacturing by 1.5 per cent to 72 900; and in Mining & Quarrying by 22.2 per cent to 6 150. Employment in the Construction sub-industry declined by 2.5 per cent, as residential construction slowed in 2014 despite continued expansion and renovation work within the tourism sector (see chapter on Construction).

Overall, the Services Industry was responsible for the majority of employment at 67.1 per cent of the employed labour force. The Services Industry registered increases in all areas except the Education and the Health & Social Work sub-industries, which recorded declines of 1.1 per cent and 2.1 per cent, respectively. The Electricity, Gas & Water Supply sub-industry increased by 0.6 per cent to 8 500; both the Real Estate, Renting & Business Activities and Wholesale & Retail, Repair of Motor Vehicle & Equipment sub-industries grew by 2.2 per cent to 67 350 and 226 425, respectively. The largest percentage increase occurred in the Hotel & Restaurant Services sub-industry, which grew by 6.2 per cent to 80 500. This could be attributed to the expansion of the Tourism sector (see chapter on Tourism).

As in 2013, the two largest employers in 2014 remained the Wholesale & Retail, Repair of Motor Vehicle & Equipment; and the Agriculture, Hunting, Forestry & Fishing industries at 20.0 per cent and 18.4 per cent, respectively. Construction remained the third largest employer, accounting for 7.2 per cent of employment, followed closely by Hotel & Restaurants Services with 7.1 per cent.

Employment by Occupation Group

Employment in five occupation groups recorded increases, these were, the Elementary Occupations, by 5.2 per cent; Clerks, by 4.5 per cent; Professionals, Senior Officials

TABLE 21.6
EMPLOYED LABOUR FORCE BY OCCUPATION GROUP, 2013–2014
(’000)

OCCUPATION GROUP	2013 ^r					2014 ^p				
	January	April	July	October	Annual Average	January	April	July	October	Annual Average
Professionals, Senior Officials & Technicians	248.0	241.9	239.4	249.8	244.8	247.8	251.7	253.4	250.7	250.9
Clerks	92.1	100.7	101.9	102.2	99.2	101.4	104.6	103.0	105.7	103.7
Service Workers and Shop & Market Sales Workers	233.9	223.1	218.9	215.3	222.8	228.8	222.0	224.2	221.0	224.0
Skilled Agricultural & Fishery Workers	194.4	201.3	202.9	198.2	199.2	202.5	199.0	199.1	205.0	201.4
Craft & Related Trades Workers	133.6	139.3	141.8	136.7	137.9	137.8	134.7	136.3	134.8	135.9
Plant & Machine Operators & Assemblers	65.8	57.8	60.9	64.7	62.3	66.6	60.3	58.7	61.9	61.9
Elementary Occupations	140.5	141.7	142.1	142.9	141.8	143.8	159.9	147.9	145.2	149.2
Occupation not specified	1.7	1.5	0.0	0.7	1.0	1.4	0.8	2.0	0.2	1.1
TOTAL	1 110	1 107.3	1 107.9	1 110.5	1 108.9	1 130.1	1 133	1 124.6	1 124.5	1 128.1

Note: Discrepancies are due to rounding

p - preliminary

r - revised

& Technicians grew by 2.5 per cent; Skilled Agriculture & Fishery Workers, by 1.1 per cent; and Service Workers, Shop & Market Sales Workers, by 0.5 per cent. On the other hand, there were declines in employment in the two remaining occupation groups: Craft & Related Trades Workers, by 1.4 per cent; and Plant & Machine Operators by 0.7 per cent (Table 21.6).

Males continued to dominate employment in four occupation groups: Plant & Machine Operators & Assemblers (95.0 per cent or 58 650 persons); Craft & Related Trades Workers (91.2 per cent or 123 950 persons); Skilled Agricultural & Fishery Workers (83.0 per cent or 166 800); and Elementary Occupations (51.1 per cent or 76 300). Females maintained a higher representation in the following occupation groups: Clerks (74.1 per cent or 76 850); Professionals, Senior Officials & Technicians (60.0 per cent or 150 500); and Service Workers and Shop & Market Sales Workers (60.0 per cent or 134 400).

Unemployment

Unemployment, in keeping with the standard (relaxed)⁹ international definition, refers to persons who are without work and currently available for work, whether actively looking for work (seekers) or not (non-seekers). The ILO indicated that unemployment was 201.3 million globally in 2014. Annual average unemployment locally declined by 19 875, a decrease of 9.9 per cent compared with the previous

year. Consequently, the annual average unemployment rate declined to 13.7 per cent from 15.2 per cent in 2013 (Table 21.8). Although the number of unemployed females (107 475) declined, it remained higher than unemployed male (72 200).

Unemployment levels declined across all age groups with the most notable reduction occurring in the 14–19 and 20–24 age groups, declining by 17.6 per cent and 11.0 per cent, respectively. The level of unemployment declined by 8 825 among persons in the prime working age (25–54 years). The unemployed labour force comprised 66 925 youth and 112 750 adults, representing a decrease of 12.6 per cent and 8.3 per cent, respectively. Both the youth and adult unemployment rates scaled down by 3.5 percentage points and 1.0 percentage point, respectively, to 34.2 per cent and 10.1 per cent, respectively.

Labour Migration

Labour migration remained a prevailing feature of the Jamaican labour market as it is considered to be a safety valve against high unemployment levels. 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 principal managed labour migration scheme.

TABLE 21.7
UNEMPLOYMENT BY MAJOR DEMOGRAPHIC GROUPS, 2013–2014
(*000)

	2013 ^r						2014 ^p					
	January	April	July	October	Annual Average	Rate (%)	January	April	July	October	Annual Average	Rate (%)
TOTAL	187.5	215.1	201.6	194.0	199.6	15.2	175.0	178.1	179.4	186.2	179.7	13.7
Youth (14–24 yrs.)	71.4	81.2	78.7	75.1	76.6	37.7	64.8	66.1	66.1	70.7	66.9	34.2
Adults (25 yrs. and over)	116.1	133.9	122.9	118.9	123.0	11.1	110.2	112.0	113.3	115.5	112.8	10.1
MALE	75.2	85.9	83.6	75.8	80.1	11.2	72.7	74.5	70.5	71.1	72.2	10.1
Youth (14–24 yrs.)	32.4	35.6	34.9	35.8	34.7	30.0	31.1	30.0	30.1	30.9	30.5	27.0
Adults (25 yrs. and over)	42.8	50.3	48.7	40.0	45.5	7.6	41.6	44.5	40.4	40.2	41.7	6.9
FEMALE	112.3	129.2	118.0	118.2	119.4	20.0	102.3	103.6	108.9	115.1	107.5	18.1
Youth (14–24 yrs.)	39.0	45.6	43.8	39.3	41.9	48.0	33.7	36.1	36.0	39.8	36.4	44.1
Adults (25 yrs. and over)	73.3	83.6	74.2	78.9	77.5	15.3	68.6	67.5	72.9	75.3	71.1	13.9

Note: Discrepancies are due to rounding
p - preliminary
r - revised

Source: Statistical Institute of Jamaica

9. 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.

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 2.4 per cent to 14 056 participants (Table 21.8).

Employment in the Canadian Farm and Factory Programme outperformed employment in the US Farm Programme by 3 028. The Canadian programme registered 7 595. The US Farm Programme, on the other hand, experienced a decline in employment from 4 628 to 4 567. Like the US Farm Programme, the US Hotel Workers Programme showed a decline from 1 418 to 1 242, while the Canadian Skill/Hotel Workers Programme experienced increased employment, from 463 to 652.

The Overseas Employment Programme continued to be male dominated, accounting for 12 622 compared with 1 434 females. Males also made up the majority of participants in the US Farm Work, and the Canadian Farm and Factory Programmes, 4 567 and 7 306, respectively. Females however, were the main recipients of employment opportunities in the US Hospitality Programme (747 or 60.1 per cent) and the Canadian Skilled Workers/Hospitality Programme (398 or 61.0 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. Remittances under the Canadian Farm/Factory programme marginally increased to Cn\$15.4 million.

Work Permits¹⁰

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 permit¹¹.

The number of work permit applications received by the MLSS more than doubled to 4 388, with 2 468 new and 1 920 renewals. A total of 4 535 applications were approved in the year¹², with 52.0 per cent being approval of new work permit applications. The Wholesale & Retail, Repair of Motor Vehicle & Equipment Industry recorded the most work permit applications and approvals, with 1 452 and 1 507, respectively. This was followed by Construction and Installation with 1 298 and 1 487 applications and approvals, respectively, and Hotels & Restaurant Services with 595 and 689, respectively.

LABOUR MARKET REFORM

The MLSS continued to lead the process of labour market reform, with the approval by Cabinet for the establishment of a Labour Market Reform Commission and Secretariat. The primary objective is to undertake a comprehensive review of Jamaica's labour market toward reformation for a more efficient, effective and productive labour market in the areas of Education & Training; Social Protection; Productivity, Innovation & Technology; Industrial Relations; and labour market policies and legislation.

LEGISLATIVE REFORM

The development of, and amendment to, labour legislation constitute an important part of labour market reform and requires the examination of several pieces of labour legislations. The ministry carried out the drafting and/or revision of the following:

TABLE 21.8
JAMAICANS EMPLOYED IN NORTH AMERICA UNDER THE OVERSEAS EMPLOYMENT PROGRAMME
BY SEX AND TYPE OF EMPLOYMENT, 2013–2014

	US Farm Work Programme		US Hospitality Programme		Canadian Farm & Factory Programme		Canadian Skilled Worker/Hospitality Programme		TOTAL	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
MALE	4 627	4 567	622	495	6 944	7 306	157	254	12 350	12 622
FEMALE	1	0	796	747	269	289	306	398	1 372	1 434
TOTAL	4 628	4 567	1 418	1 242	7 213	7 595	463	652	13 722	14 056

Source: Ministry of Labour and Social Security

10. Data for work permit is preliminary.

11. 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.

12. Work permit approvals include applications carried forward from the previous year.

- discussions were held with the Chief Parliamentary Counsel (CPC) on the draft Occupational Safety and Health Bill
- the MLSS reviewed feedback received from the CPC and the Attorney General’s Chambers on the Cabinet Submission outlining 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 and is awaiting further instructions to proceed
- proposed amendments to the Workmen Compensation Act to strengthen the provisions set out therein. The finalized paper was sent to stakeholders for feedback.

The Employment (Flexible Work Arrangements) (Miscellaneous Provisions) Act 2014 was passed by both Houses of Parliament and became effective in November. This finalized the amendment to 24 pieces of legislation to facilitate wholesale implementation of flexible work arrangements across all sectors and pave the way for employers and employees to legally implement variable work schedules which may prove essential to improving productivity, efficiency and competitiveness. As approved, flexible work arrangement would extend the work day to a maximum 12 hours; the work week would consist of 40 hours; all seven days of the week would be considered as possible normal working days; and overtime would be earned after completion of 40 hours.

The MLSS also carried out work relating to the ratification of several ILO conventions, in particular, the Domestic Workers Convention, 2011 (No.189) and the Maritime Labour Convention, 2006. In relation to the ratification of the Convention 189, existing domestic laws do not adequately support the Convention and currently there are no legislations to address a number of the Articles in the Convention. As a result, the ratification of Convention 189 could not be supported. A recommendation was made for the enactment of laws or the implementation of a policy to satisfy the requirements of the Convention. The ministry will prepare a policy paper to facilitate either recommendation.

In relation to the Maritime Labour Convention, 2006, the ILO indicated their willingness to provide funding assistance toward the amendment of legislation to facilitate the ratification of the Convention. A draft Bill has been prepared and submitted to the CPC for review.

WAGES, SALARIES AND BENEFITS

Public Sector Wage Settlements

An update of the Civil Service Establishment Order indicated that there were 32 639 general posts across the sector. The estimated public sector wage bill for fiscal year (FY) 2014/15 was \$161.7 billion, which was a 3.0 per cent average percentage change relative to FY 2013/2014 (\$157.3 billion). The increase in the wage bill between fiscal years 2013/14 and 2014/15 was as a result of payment of performance increments; and the payment of the \$25 000.00 one-off sum to each public officer under the 2012/2015 Heads of Agreement between the Government of Jamaica (GOJ) and the Jamaica Confederation of Trade Unions (JCTU). Other attendant reasons for the increase included the implementation of new rates associated with the reclassification of health 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 law, that a worker can be paid. Effective January 2014, the National Minimum Wage rate increased to \$5 600.00 per 40-hour week or \$140.00 per hour from \$5 000.00 per 40-hour week, and for industrial security guards it was increased to \$8 198.80 per week or \$204.97 per hour. Allowances for industrial security guards also increased as follows: laundry allowance at \$37.30 per hour; firearm allowance at \$41.00 per hour; and dog handler’s allowance at \$27.58 per hour. Life insurance for security guards remained at \$2.0 million.

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 declined by 14.6 per cent to 332 (Table 21.9) during the year. This resulted from declines in all but one of the reported causes—the Bargaining and Representational Rights (27). The main causes of these disputes included: Dismissals/Suspensions (254); Wages & Conditions of Employment (18); and miscellaneous causes¹³ (33). The Real Estate, Renting & Business Activities industry accounted for the largest proportion of reported industrial disputes, with 22.8 per cent of the total, followed

13. Miscellaneous causes include vacation leave, pension benefits, demotions and unpaid bonuses.

TABLE 21.9
INDUSTRIAL DISPUTES AND WORK STOPPAGES BY INDUSTRY AND CAUSE, 2013–2014

INDUSTRY	WAGES & CONDITIONS OF EMPLOYMENT				BARGAINING RIGHTS				DISMISSALS AND SUSPENSIONS				MISCELLANEOUS ^a				ALL CAUSES				
	2013		2014		2013		2014		2013		2014		2013		2014		2013		2014		
	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	Ind. Work Disp. Stops.	
Agriculture, Hunting, Forestry & Fishing	7	0	0	0	1	0	0	0	2	0	0	5	0	2	1	0	0	12	1	5	1
Mining & Quarrying	1	0	0	0	0	0	1	0	3	0	2	0	0	4	0	2	0	8	0	5	0
Manufacturing	4	1	1	0	4	0	3	0	37	0	31	0	0	2	0	2	0	47	1	37	1
Electricity, Gas and Water Supply	3	0	1	0	1	0	4	0	8	0	6	0	0	4	0	1	0	16	0	12	0
Construction	1	0	0	1	0	0	2	0	3	0	8	0	0	1	1	2	0	5	1	12	1
Wholesale & Retail, Repair of Motor Vehicle & Equipment	0	0	1	0	1	0	0	0	21	0	34	1	0	0	0	1	1	22	0	36	0
Hotels & Restaurants Services	0	0	0	0	1	0	3	0	22	0	19	0	0	1	0	0	0	24	0	22	0
Transport, Storage and Communication	2	0	3	1	3	0	5	0	20	0	18	0	0	6	0	5	0	31	0	31	0
Financial Intermediation	3	3	1	0	2	0	2	0	19	0	17	1	0	7	0	4	0	31	3	24	3
Real Estate, Renting & Business Activities	3	0	4	0	5	0	2	0	87	0	63	0	0	8	0	7	0	103	0	76	0
Public Administration & Defence; Compulsory Social Security	4	0	3	0	0	0	3	0	13	1	16	0	0	11	1	3	0	28	2	25	2
Education	3	0	2	0	0	0	2	0	29	0	16	0	0	7	0	4	0	39	0	24	0
Health & Social Work	0	0	2	0	0	0	0	0	12	0	8	0	0	5	1	1	0	17	1	11	1
Other Community, Social and Personal Service Activities	0	0	0	0	0	0	0	0	4	0	8	0	0	0	0	0	0	4	0	8	0
Private Households with Employed Persons	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	1	0	2	0	3	0
Industry Not Specified (Incl. Extra-Territorial Bodies)	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1	0
All Industries	31	4	18	2	18	0	27	0	282	1	254	2	58	4	33	1	389	9	332	9	9

Notes: Ind. Disp. - Industrial Disputes
Work Stops. - Work Stoppages

a - Miscellaneous includes issues involving lay-offs, redundancies and end-of-project compensation

r - revised

Source: Ministry of Labour and Social Security

by the Manufacturing and Wholesale & Retail Trade; Repair of Motor Vehicle and Equipment industries with 11.1 per cent and 10.8 per cent, respectively.

Trade unions remained active in their representation of workers involved in industrial disputes. The Bustamante Industrial Trade Union (BITU) and the National Workers' Union (NWU) were involved in most industrial disputes, taking part in 36 and 21 disputes, respectively; 225 disputes involved non-unionized individuals.

During the period, work stoppages declined from nine to five. Two work stoppages were reported in the Construction industry (see Table 21.9). Wages & Conditions of Employment and Dismissals & Suspensions each accounted for two work stoppages. The NWU was involved in four work stoppages and one work stoppage involving a joint BITU/UAWU/NWU action.

Under Section 9 (5) of the Labour Relations and Industrial Relations Disputes Act 1975 (LRIDA), industrial action¹⁴ undertaken by an essential service is deemed legal under certain circumstances¹⁵. One out of the five reported work stoppages occurred in the essential services, in the Petroleum Trade sector.

The number of man-days lost as a result of work stoppages declined from 7 652 to 1 991. The number of workers involved also declined from 2 325 to 402. Both the Construction and Electricity, Gas & Water Supply industries experienced significant increases in the average number of man-days lost, to 1 003 and 690 from 160 and 0, 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, 36 disputes were referred to the IDT, with Dismissals & Suspensions accounting for 35 and one miscellaneous¹⁶ dispute. The IDT handed down awards for 21 disputes, while three disputes were settled by agreement and four 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.

The ministry carried out a total of 1 856 inspections during the year, 608 less inspections than the previous year. The number of inspections across all the categories also declined as total Building inspections declined from 280 to 353; Ship inspections was reduced by half to 90; inspection of Docks from 15 to 10; Registered Factories from 1 498 to 1 273; and inspection of Unregistered Factories to 203 from 262.

In response to complaints made to the MLSS, special investigations were conducted for four complaints, a decline from 10. 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 decreased from 320 to 317, of which 160 accidents qualified for investigation. Of the 160 accidents that warranted investigation, 93 were investigated. The number of job-related deaths was 2, down from 8 the previous year.

LABOUR MARKET INFORMATION

As part of ongoing efforts to provide labour market information, the Planning Institute of Jamaica (PIOJ) in collaboration with the Labour Market Information Technical Advisory Committee (LMITAC), the Ministry of Labour & Social Security, the HEART Trust/NTA and the Inter-American Development Bank (IDB) hosted its 6th annual Labour Market Forum in December. The theme for day one of the two-day event was "Promoting Youth Employability and Entrepreneurship through STEM". The forum featured presentations on the emerging areas of employment by the HEART Trust/NTA research team; local and overseas employment opportunities for youth and the MLSS' initiatives to support youth employment; social entrepreneurship as an avenue for youth employment; and the options for financial and technical support for youth entrepreneurial development. The forum highlighted the importance and need for public education on labour market information; additional research on a consistent basis; and greater partnership with and input from the private sector on labour market needs. The second day

14. Industrial action refers to any lock-out, strike or any course (other than a lock-out or strike) which, in contemplation or furtherance of an industrial dispute, is carried on by one or more group of workers...with the intention of preventing or reducing the production of goods or the provision of services.

15. Industrial action carried out by essential service workers is considered legal where the dispute was reported to the Minister of Labour in accordance with subsection (1) and he failed to comply with subsection (3) or subsection (4) or subsection (7) of the Labour Relations and Industrial Disputes Act (LRIDA); or, that dispute was referred to the Industrial Disputes Tribunal for settlement and the Tribunal failed to make an award within the period specified in section 12 of the LRIDA.

16. Miscellaneous includes emergency duty allowance, payments for strike periods and issuance of letters of reprimand.

focused solely on disseminating the findings of the Actuarial Review of the National Insurance Scheme (NIS). The findings indicated the need for a significant capital injection into the National Insurance Fund as a short-term solution; a sustainable approach for the NIS; and an improvement in the information technology system. Resulting from this, a Cabinet Submission will be drafted outlining the recommendations for ensuring long-term sustainability of the NIS.

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 continued to strengthen the LMIS and the ELE to increase human and institutional capacity with technical and financial support from the IDB through the Integrated Social Protection and Labour Programme.

Phase 1 of the programme was focused on job placement, with over 8 000 jobseekers and approximately 250 employers registered, and 512 notified vacancies¹⁷ with 271 jobseekers (210 females) being placed.

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. Unlike the previous year, Teacher was the most advertised occupation, with 1 450 compared with 977 in 2013. This was followed by Manager which posted 1 003 advertisements and Sales Representative with 826. Senior Official was also in high demand with 606 vacancies. The

occupations with the least number of vacancies were Chef and Cashier, with 375 and 354, respectively.

PRODUCTIVITY

Throughout the year, the Jamaica Productivity Centre (JPC) implemented several activities in keeping with its mandate to improve productivity in the private and public sectors and inculcate a national productivity culture in the citizenry. As a result, the JPC’s work programme focused on the following strategic priorities:

1. instilling a productivity conscious behaviour as the national norm
2. providing research and advocacy to support policies for accelerating productivity growth, competitiveness, employment and economic prosperity
3. facilitating productivity enhancement in private and public sector organizations.

The JPC through the Technical Assistance Service Unit (TASU) offered capacity building training through targeted workshops and seminars. This was coupled with technical assistance through productivity audits and reporting. During FY2014/15, audits were done at the request of four public sector entities. Among the activities undertaken during the review year, was the signing of a Memorandum of Understanding with Jamaica Promotions Corporation (JAMPRO) to provide technical assistance in the area of productivity improvement to 20 export ready firms participating in the ExportMax II programme.

The unit continued its work in the area of energy productivity by training and sensitizing persons in collaboration with the HEART Trust/NTA. The team also provided technical expertise to the ESCO Industry Project through the spearheading of the Capacity Building working group. Through the cooperation of the Japanese government, a productivity expert was provided to the unit to assist with providing productivity consultancy services to private and public organizations.

The JPC’s campaign for promoting productivity was done under the theme “Productivity: Pathway to Prosperity”. The campaign targeted specific groups as well as the general population with the hosting of a productivity workshop for journalists. This initiative was done collaboratively with the Press Association of Jamaica under the theme “Advancing the Productivity Revolution” and was aimed at bringing productivity practitioners and journalists together to discuss the role of the media in the pursuit of sustained productivity improvement.

TABLE 21.10
TOP TEN HOT JOBS IN
THE JAMAICAN LABOUR MARKET, 2014

JOB TITLE	NUMBER OF ADVERTISEMENTS
Teacher/Lecturer	1 450
Manager	1 003
Sales Representative	826
Supervisor	546
Security Guard/Gatekeeper	513
Driver/Delivery Rider	489
Bartender/Waiter	464
Chef/Cook/Baker	375
Cashier	354
TOTAL	6 020

Source: Ministry of Labour and Social Security

17. Vacancy notifications refer to vacancies reported to the ELE by employers, to be filled by registered job-seekers.

Table 21.11a provides a summary of the performance of several Total Economy Indicators over the period 2009–2013. Labour productivity or output per worker over the review period remained constant. This stemmed from Gross Domestic Product (GDP) and employed labour force declining at the same annual average rate of -0.7 per cent. Although labour productivity was -0.6 per cent in 2013, it was an improvement relative to 2012 (-1.9 per cent). Employment hours, on average, increased by 0.2 per cent annually while output per hour, a preferred measure for labour productivity, declined at an average rate of 0.8 per cent per annum.

Unit Labour Cost (ULC), a measure of labour cost competitiveness of the economy, is defined as a ratio of real wage to labour productivity. ULC becomes less competitive when real wage grows faster than labour productivity and becomes more competitive when labour productivity grows faster than real wage.

Over the review period, ULC declined at an average annual rate of 1.5 per cent, which represents an overall improvement in labour cost competitiveness. This resulted from a lack of

growth on average labour productivity (0.0 per cent) and a 1.5 per cent reduction in real wages per annum. There was an improvement in labour cost competitiveness (-1.0 per cent) in 2013 relative to 2012 (0.4 per cent). The improvement in 2013 was due to real wage (-1.5 per cent) declining faster than labour productivity (-0.6 per cent).

Total Factor Productivity (TFP) is a residual measure accounting for changes in output not caused by changes in labour and capital. Over the five-year period, TFP declined at an average annual rate of 0.2 per cent. This means that all the other factors of production such as skills and competencies of workers and management, demand and supply conditions in goods and factor markets, governance structures, and investment climate contributed to a decline in labour and capital productivity and consequently, a reduction in output. TFP increased in 2013, recording -0.3 per cent relative to -0.9 per cent in 2012.

A summary of labour productivity growth rates by industry for the period 2009–2013 is displayed in Table 21.11b. The Goods Producing Industries that recorded positive average

TABLE 21.11a
GROWTH IN SELECTED TOTAL ECONOMY INDICATORS, 2009–2013

Period	Value Added		Employment		Unit Wage Rate	Output per Worker	Output per Hour Worked	Total Factor Productivity
	Output	Employment	Hours	Labour Cost				
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
2013	0.2	0.7	0.7	-1.5	-1.0	-0.6	-0.6	-0.3
2009–2013 Average	-0.7	-0.7	0.2	-1.5	-1.5	0.0	-0.8	-0.2

Source: Jamaica Productivity Centre

TABLE 21.11b
LABOUR PRODUCTIVITY GROWTH RATES BY INDUSTRY, 2009–2013

	2009	2010	2011	2012	2013	2009–2013 Average
I GOODS PRODUCING INDUSTRY						
Agriculture, Forestry & Fishing	10.8	5.2	23.8	-2.4	-2.1	7.1
Mining & Quarrying	-6.2	15.1	20.2	-27.7	-11.9	-2.1
Manufacture	4.5	-4.2	9.7	-5.8	4.6	1.8
Construction	3.1	1.4	2.3	2.9	0.9	2.1
II SERVICES INDUSTRY						
Electricity & Water Supply	-7.7	6.0	-9.4	0.9	-9.3	-3.9
Wholesale & Retail Trade; Repair and Installation of Machinery	-1.3	-4.4	1.4	-5.0	-1.0	-2.1
Hotels and Restaurants	6.3	8.8	-2.7	0.3	4.2	3.4
Transport, Storage & Communication	5.5	-0.7	-2.2	0.8	1.0	0.9
Financial & Insurance Services	-5.1	-6.2	4.3	-4.0	1.4	-1.9
Real Estate, Renting & Business Activities	-1.8	-8.9	-11.9	3.0	-13.2	-6.6
Producers of Government Services	3.4	0.7	-6.6	-0.4	-2.4	-1.1

Source: Jamaica Productivity Centre

annual labour productivity growth were Agriculture, Forestry & Fishing (7.1 per cent); Construction (2.1 per cent); and Manufacturing (1.7 per cent). In contrast, Mining & Quarrying recorded a decline in average annual labour productivity (-2.1 per cent).

Only two of the seven Service Industries experienced positive labour productivity. These were Hotels and Restaurants (3.4 per cent) and Transport, Storage and Communication (0.9 per cent). The remaining five Service Industries recorded negative annual labour productivity growth, with Real Estate, Renting and Business Services experiencing the worst results with -6.6 per cent.

OUTLOOK

The Labour Market Reform Commission will commence work on developing an agenda on comprehensive labour market reform, which will focus on: Education & Training; Social Protection; Productivity, Innovation & Technology; Industrial Relations; and labour market policies and legislation. The Commission will be expected to make recommendations on the way forward for achieving a modern and flexible Jamaican labour market.

Work will continue on the improvement of the LMIS through the IDB-funded Integrated Social Protection & Labour Programme with the implementation of phase 2 in 2015. Phase 2 will focus on upgrading the Labour Market Intelligence (LMI) and the Skills Bank web pages. The

aim will be to address the issues of employment; hence the services will be tailored to meet the specific needs of different stakeholders. These web pages will provide more timely and reliable labour market information on employment opportunities, research and statistics.

Globally, the forecast for employment remains dim for the next five years as unemployment is expected to rise by some 3 million in 2015 as the labour force grows, further extending the global jobs gap. There are expectations, however, of positive movements in employment levels locally. Development in various sectors, particularly, the Tourism, Agriculture, and Business Process Outsourcing (BPO) sectors, are expected to yield additional jobs locally in the coming year. The strategy for the expansion of the BPO sector also projects the creation of approximately 6 500 jobs in FY 2015/2016, and an increase in employment in that sector from 15 000 to 30 000 by 2020. It is anticipated that the expansion within the Tourism sector, that is, the renovation and construction of hotels, will result in the creation of additional jobs. The Courtyard by Marriot Hotel is expected to employ an estimated 430 Jamaicans, while the Moon Palace Jamaica Grande (formerly Sunset Jamaica Grande) is expected to employ approximately 1 020 when completed in 2015.

It is anticipated that continued implementation of the growth strategy will result in increased job prospects through the various strategic investment projects and initiatives aimed at building business confidence and entrepreneurship locally. ■

HUMAN DEVELOPMENT SOCIAL PROTECTION AND CULTURE



The Urban Development Corporation's project, the Simón Bolívar Cultural Centre (SBCC), has won the Jamaican Institute of Architects' Award for Excellence in Remodelling/Refurbishing. The construction of the Centre is part of the UDC's plan for the redevelopment of downtown Kingston, which aims to reposition the city as a cultural hub.

Photograph contributed by UDC

EDUCATION AND TRAINING

INTRODUCTION

A country's sustained growth can be measured by the development of its people. It is therefore essential that as a country, Jamaica seeks to develop its human resources through the provision of relevant educational and training opportunities as articulated in Outcome Number 2: World Class Education and Training, in *Vision 2030 Jamaica – National Development Plan*

Being cognizant of this reality, the Ministry of Education (MOE) articulates in its Mission, the mandate to create socially conscious and productive citizens by providing quality education and training for all Jamaican citizens. In its continued effort to achieve this mandate, the MOE has been developing and implementing policies and programmes aimed at improving the quality of outputs from the sector. Focus has been placed on a number of priority areas including:

- Early Childhood Development
- Special Education
- Media and Information Communication & Technology (ICT) in Education
- Improvement in Teacher Quality
- Access to and quality of tertiary education
- Increased access to Technical and Vocational Education and Training (TVET) including its infusion in the formal school system and expansion of related training programmes.

These priorities are being addressed within the context of a Ministry that is in the process of modernisation and transformation through the Education System Transformation Programme (ESTP), which is the response to the Education Task Force Report of 2004. The ESTP is an all-embracing set of actions designed to achieve the desired standard of performance and levels of accountability for the delivery of quality outputs from the sector.

Among the strategies employed by the sector are the following:

- ensuring access to quality early childhood education and development

- improving the teaching and learning environment at the primary and secondary levels by creating additional school places, increasing nutritional support, increasing access to and use of technology and provision of relevant support materials
- ensuring that increasing number of graduates from the secondary level are prepared for further education and/or the world of work
- promoting and using performance-based standards to measure outputs from the sector
- ensuring increased access to post-secondary and tertiary education
- ensuring increased access to education and training opportunities for disadvantaged groups including unattached youth and persons with challenges
- forging greater partnerships with the private sector, parents, communities and international development partners in support of the education sector.

In an effort to maintain relevance of the system, the curricula at all levels are being revised to facilitate articulation, while ensuring that they are standards driven and competency-based. The foundation for lifelong learning should start from the early childhood level where emphasis should be on the competencies that are required for the child to be ready for primary education. The skills and competencies acquired during the primary years should prepare the students for a seamless transition into secondary education. At the secondary level, the curriculum should prepare students for further education and/or the labour market.

Recognizing the importance of Technical Vocational Education and Training (TVET) for personal and national development, the Ministry has mandated that by the end of 2016 all students exiting the system at the secondary level should have a marketable skill, regardless of their academic inclination. TVET is being integrated into the education system to ensure that the system prepares fully rounded students equipped with the skills and competencies necessary for a modern labour market.

The new integrated curricula and the use of the Science Technology Engineering and Mathematics (STEM) methodology should foster a change in the perception of TVET. STEM will help students to become strong communicators, think deeper and more creatively, and apply solutions to real world problems. They will be encouraged to explore, be curious and collaborate.

The Human Employment and Resource Training/National Training Agency (HEART Trust/NTA) is being repositioned to focus more directly on its mandate relating to training for employment. HEART Trust/NTA and the National Council on Technical Vocational Education and Training (NCTVET) have been facilitating training programmes in secondary schools and in the offerings of tertiary institutions aimed at preparing students for work. Thus, Workforce Colleges and Training Institutes have been established to offer higher level training for individuals who wish to pursue training in their vocational areas. Partnerships have been forged to engender lifelong learning and to increase access to training opportunities for all persons.

An estimated 71.3 per cent (763 798 persons) of the school-age cohort (3–24 years old) were enrolled in the 2013/14 academic year. The total number of students enrolled in the public and private education institutions at the pre-primary, primary and secondary levels was 613 136. The primary level accounted for 33.7 per cent of the total (Figure 22A). Gross Enrolment Rates (GER) for the cohorts were 99.8 per cent at pre-primary, 99.4 per cent at primary, and 97.3 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 15 760 (70.4 per cent females) while, 62 451 persons (54.4 per cent female) were trained as skilled and semi-skilled personnel.

The focus of the analysis in this chapter will be on the academic year 2013/14, however, there are entities whose data were analyzed using the fiscal year 2013/14 and calendar year 2014. The differences will be referenced in the chapter.

SECTION 1: FINANCING

Education financing continued to be provided by the Government of Jamaica (GoJ) with supportive contributions from the private sector, households, international development partners, community and faith-based organizations. Contributions to education by households 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 the fiscal year (FY) 2014/15, the GoJ allocated \$80.4 billion to the sector, representing 12.1 per cent of the national budget, a 6.3 per cent reduction compared with the allocation provided in 2013/14 (Table 22.1a). Approximately \$78.3 billion was for recurrent expenditure, with 73.8 per cent of that being for salaries and other emoluments.

Of the overall budget for Education, 40.1 per cent was allocated to the secondary level; 36.5 per cent to the primary; 18.5 per cent to tertiary; 3.5 per cent to early childhood; and 1.4 per cent to special education. The GoJ's annual per capita expenditure for FY 2013/14 remained relatively unchanged compared with the previous year and was \$334 386.00 at the

TABLE 22.1a
ESTIMATES OF EXPENDITURE BY FUNCTION AND PROGRAMME, 2013/14–2014/15
\$M

PROGRAMME	REVISED ESTIMATE			ESTIMATED		
	RECURRENT	2013/14 CAPITAL	TOTAL	RECURRENT	2014/15 CAPITAL	TOTAL
Central Administration	1 403 139	1 229 638	2 632 777	1 135 902	1 561 093	2 696 995
Early Childhood Education	2 676 055	98 530	2 774 585	2 623 099	81 530	2 774 585
Primary Education	29 223 436	145 924	29 369 360	27 154 085	160 000	29 369 360
Special Education	1 114 101	–	1 114 101	1 038 928	60 000	1 114 101
Secondary Education	32 198 951	13 500	32 212 451	30 159 060	–	32 212 451
Tertiary Education	14 673 035	216 626	14 889 661	13 569 939	177 121	14 889 661
Adult Education	259 996	–	259 996	246 531	–	259 996
Common Educational Services	1 989 970	–	1 989 970	1 947 183	–	1 989 970
Library Services	922 633	4 200	926 833	867 597	26 000	926 833
Students Nutrition	–	18 100	18 100	–	6 625	18 100
Disaster Management	–	–	–	–	–	–
TOTAL Education Budget	84 461 316	1 726 518	86 187 834	78 742 324	2 072 369	80 814 693
Disaster Management	–	–	–	–	–	–
Appropriations in Aid	–450 000	–	–450 000	–450 000	–	–450 000
TOTAL MoE BUDGET	84 011 316	1 726 518	85 737 834	78 292 324	2 072 369	80 364 693

Note: Allocations for nutrition are distributed across all levels from early childhood to secondary

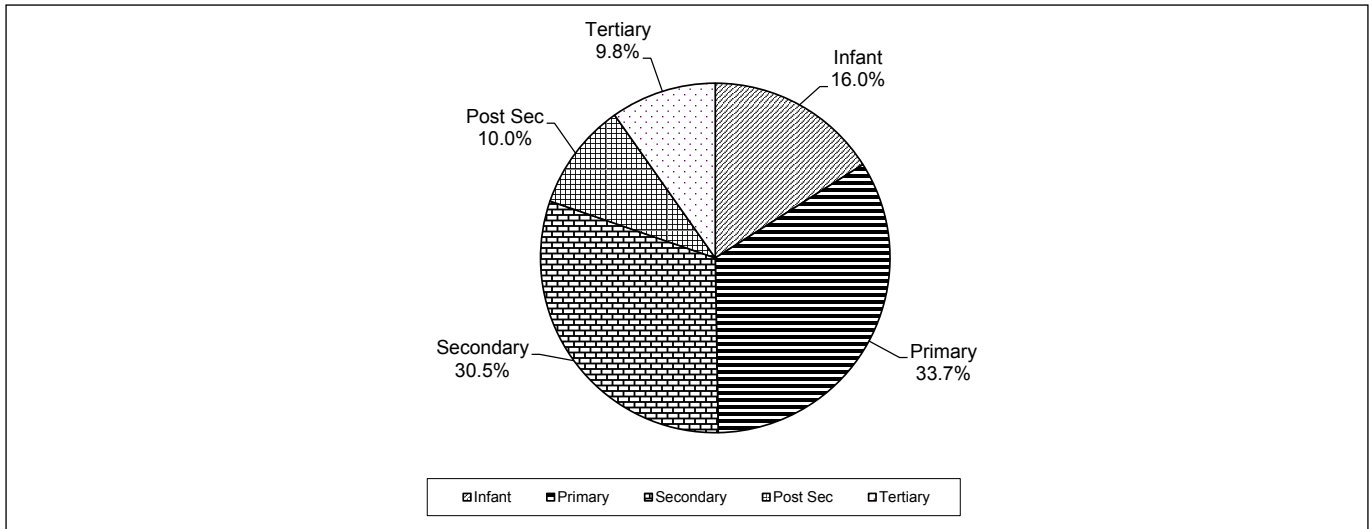


FIGURE 22A: ENROLMENT BY EDUCATION LEVEL (3–24 YEARS), 2013/14

tertiary level; \$281 067.00 for special education; \$139 639.00 at the secondary level; \$114 789.00 at the primary and \$20 042.00 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's allocation of \$2.8 billion for the review period covered subsidies for nutrition, salaries and a grant for material. The MoE's budget for ECE was supplemented by the Culture Health Arts Sports and Education (CHASE) Fund and the Jamaica Social Investment Fund (JSIF). CHASE expended \$263.8 million on activities related to research; building, equipping and upgrading of 32 Basic schools; and training. JSIF on the other hand, expended \$686.9 million on nine early childhood projects which benefited 21 366 children and staff (see section on Educational Support Programmes and Services).

The government's allocation to Primary Education was \$29.4 billion and \$32.2 billion to the Secondary level (see Table 22.1a). The GoJ also continued to provide tuition assistance to students at these levels. At the secondary level, in addition to fees for selected subjects¹ at external examinations (Caribbean Secondary Education Certificate (CSEC) and City & Guild) support was also provided for school feeding and textbooks. A total of \$1.1 billion was expended on Special Education² programmes of which \$35.0 million was disbursed to non-governmental organisations (NGOs). At the Tertiary

level, \$14.9 billion was allocated as follows: The University of the West Indies (UWI), \$7.7 billion; the University of Technology, Jamaica (UTech), \$1.9 billion; Community Colleges/Multi-disciplinary Colleges³, \$2.2 billion; and Teacher Training Colleges, \$1.7 billion, the remainder, \$1.4 billion was allocated for scholarships, boarding grants and other grants issued to the National Council on Education and for Direction and Administration.

Capital expenditure for the period increased by 16.7 per cent to \$2.1 billion (see Table 22.1a). Of the capital budget funds, multilateral and bilateral projects accounted for 70.3 per cent of expenditure. Within these projects, the largest portion of the allocation went to the Education System Transformation Programme (65.0 per cent), followed by the Education Partnership for Increased Literacy Outcomes Project (14.0 per cent), and the University of Technology Enhancement Project (12.0 per cent) (Figure 22B).

Tuition loans for qualified Jamaican students at local and overseas tertiary institutions, approved by the MoE, can be accessed through the Students' Loan Bureau (SLB). Grants are also made to beneficiaries having the greatest need. In 2013/14, a total of 15 297 applications were received of which 11 546 (70.3 per cent female) or 75.5 per cent were approved. The comparable data for 2012/13 was 20 147 applications (70.4 per cent females) with 80.5 per cent approved. While the pool of funds available for disbursement has remained

1. The Government of Jamaica (GOJ) continues to provide incentives for four subjects—English A, Mathematics, Information Technology and a Science subject—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 include a Teacher's College and a Community College.

TABLE 22.1b
MINISTRY OF EDUCATION
PER CAPITA EXPENDITURE BY EDUCATIONAL LEVEL, 2011/12–2013/14
(\$CURRENT PRICES)

LEVELS	2011/12 REVISED ESTIMATES	2012/13 REVISED ESTIMATES	2013/14 REVISED ESTIMATES
Early Childhood:			
Recognized Basic Infant	13 833	14 208	13 722
Average Early Childhood	18 909	20 190	20 042
Primary:			
Grades 1–6 of All–Age, Primary & Junior High, and Primary	81 224	84 646	92 779
Average Primary	96 220	104 389	114 789
Special Education	243 421	281 908	281 067
Secondary:			
High Schools	115 759	129 801	136 735
Technical High	128 168	132 475	137 796
Vocational/Agricultural	429 087	492 861	485 133
Grades 7–9 all of All–Age, Primary & Junior High	134 435	163 993	181 945
Average Secondary Education	117 148	132 010	139 639
Tertiary:			
University of the West Indies	494 098	503 380	516 063
University of Technology, Jamaica	141 009	149 582	148 096
Teachers' Colleges	236 295	256 848	281 306
Multidisciplinary Colleges	181 004	213 510	223 224
Edna Manley College of the Visual and Performing Arts	686 567	732 850	718 749
College of Agriculture, Science and Education	434 822	492 302	493 573
Moneague College	237 656	236 390	255 197
Bethlehem Community College	354 357	398 546	468 196
GC Foster College	177 703	320 187	319 490
Average Tertiary Education	298 148	320 432	334 386

Note: Average per capita figure for each level includes administration, supervision and other costs.

Enrolment figures for Tertiary Education are prorated because of differences between the Financial Year and the Academic Year.

Source: Statistics Unit, Ministry of Education

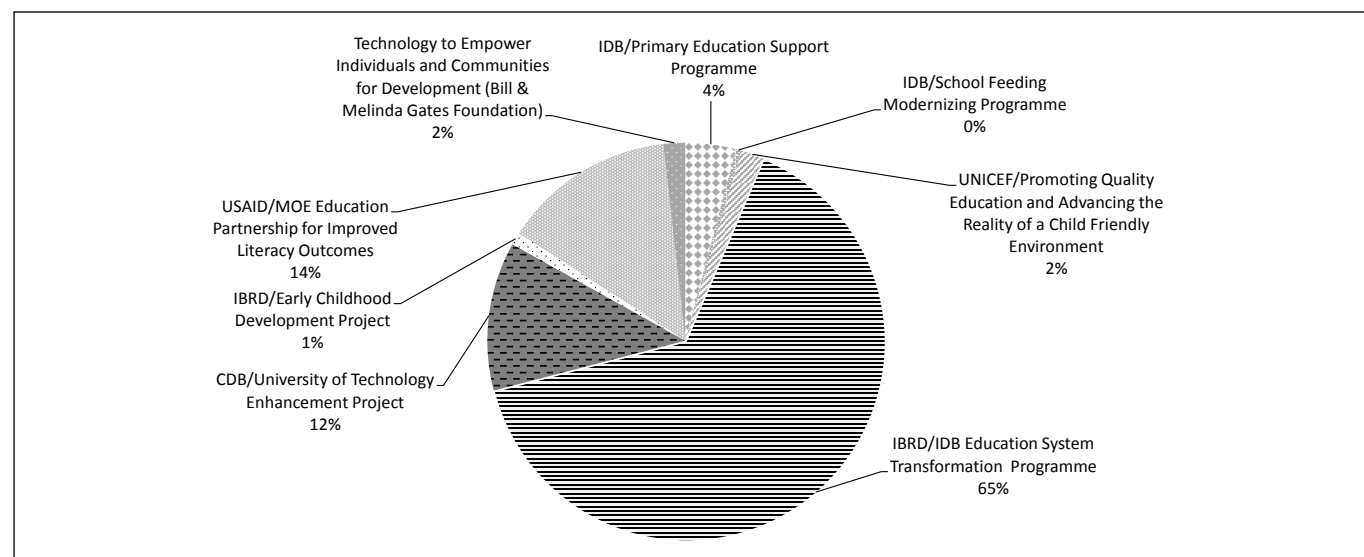


FIGURE 22B: CAPITAL EXPENDITURE (MULTILATERAL/BILATERAL PROGRAMMES, 2014)

TABLE 22.IC
STUDENT'S LOAN BUREAU
LOAN AND GRANT APPROVALS, 2013/14 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	1 096	1 814	306	550	1 402	2 364	3 766	434.5	759.2	1193.7	14.9	27.0	41.9
UWI, Mona	839	1 928	247	625	1 086	2 553	3 639	333.9	802.4	1136.0	12.1	30.7	42.9
UWI, Foreign Based	17	60	4	10	21	70	91	8.2	29.6	37.9	0.2	0.5	0.7
Teachers' Colleges	169	858	76	366	245	1 224	1 469	57.6	267.4	325	1.8	8.9	10.8
NCU	193	667	68	346	261	1 013	1 274	97.6	398.1	495.8	3.3	17.1	20.4
Community College	124	158	9	61	33	219	252	7.4	51.7	59.1	0.2	1.5	1.8
Other	294	551	88	122	382	673	1 055	108.1	162	270.2	2.1	3	5.2
Total	2 632	6 036	798	2 080	3 430	8 116	11 546	1047.3	2 470	3518.0	34.9	88.9	123.8

NOTE: Of the 15 297 applications that were completed and submitted online, 447 were declined while 3 004 students to date have communicated their desire to have the loan cancelled.

Source: Student Loan Bureau

relatively constant and the number of applicants decreased, the approval rate declined—a probable consequence of the increase in tuition fees at the tertiary level. The total loan amount approved was \$3.5 billion (\$3.4 billion in 2013). Additionally, 2 080 of those students approved, received grants amounting to \$123.8 million (Table 22.1c). The largest disbursements of assistance were to students at the University of Technology (UTech) (33.9 per cent), followed by the University of the West Indies (UWI), Mona (32.4 per cent); Northern Caribbean University (NCU) (14.2 per cent) and Teachers' Colleges, (9.2 per cent).

The Government spending on the public sector training mirrored its expenditure in 2013 amounting to \$28.1 billion (Table 22.1d). Training included both formal and non-formal programmes with the largest portion of the sum allocated to Tertiary Education, \$11.6 billion, followed by the HEART Trust NTA, \$8.4 billion.

In relation to the HEART Trust NTA, a total of 14 294 employers made the requisite 3.0 per cent contributions totalling \$7.6 billion to the Trust Fund for the 2013/14 fiscal year. This amounted to approximately 90.0 per cent of total revenue (\$8.4 billion), of which \$7.6 billion was spent on the facilitation of programme delivery. The HEART Trust Fund closed the FY 2013/14 with reserves of \$4.8 billion compared with \$4.1 billion at March 31, 2013.

Private entities such as the National Commercial Bank (NCB) Foundation, Scotiabank Jamaica Foundation (SJF), Grace Kennedy Foundation, and Digicel Foundation (DF), contributed to the financing of education.

National Commercial Bank Foundation (NCBF)

In June 2014, the NCBF reintroduced the Jamaican Education Initiative (JEI). As part of the renewed JEI, the Adopt-a-School Programme was launched. This

programme allowed all NCB Group branches and offices to adopt a primary school. Thirty-one schools were selected and the programme rolled out. The various branches and offices assisted their adopted schools in at least one of the following activities: introduction of the Junior Achievement Programme; assistance on Teachers' Day and Read Across Jamaica Day; mentorship; assistance with meal programmes; and equipment.

The annual Scholarship and Grants programme accounted for approximately \$27.0 million of total contribution. The programme provided 14 new scholarships for champions from each parish, and two national champions. Grants were also provided for students from the primary to tertiary level through the "We Believe in You Grant". Special awards were granted to persons pursuing teaching programmes and over 300 students benefited.

The Caribbean Secondary Examination Certificate (CSEC) Principles of Accounts (POA) and Principles of Business (POB) Fee Sponsorship programme also increased over the previous financial year. The \$11.7 million contribution was 23.0 per cent more than the previous year, allowing 4 614 fees to be paid for students in over 112 schools islandwide.

Scotiabank Jamaica Foundation (SJF)

The SJF expended \$23.8 million impacting 25 institutions and approximately 850 students. Scholarships were presented to 16 new Scotia Foundation Shining Star Scholars with outstanding performance in the Grade Six Achievement Test (GSAT). This brings to 102 the total number of scholars currently enrolled in the Scotia Foundation Scholars Club. In addition, scholars at both the secondary and tertiary levels attended professional assessment and career profiling sessions. In its continued focus on environmental protection, SJF once again funded the National Solid Waste Management

TABLE 22.1d
FINANCING FOR TRAINING PROGRAMMES, 2013/14–2014/15
(\$ '000)

Government Allocations	2013/2014 Revised Estimates	2014/2015 Revised Estimates
Technical and Vocational Education (MoE)	3 029.1	2 845.7
Tertiary Education	12 502.8	11 564.4
Teacher Education & Training	1 694.5	1 552.7
In-service Training (MoE)	3.3	2.4
Youth Development Services (Ministry of Youth & Culture)	406.8	406.8
Training (Ministry of Health)	307.0	281.4
General Training and Development for the Public Service (MOFPS)	36.5	20.3
Fire Brigade	51.1	62.9
Tourism Product Development Company	73.0	73.9
Management Institute for National Development	341.0	333.4
Police Academy	757.3	1 343.5
Jamaica Defence Force (Military Training)	105.0	102.5
Caribbean Maritime Institute (Min. of Transp. & Works)	546.3	669.8
Ministry of Transport and Works	9.8	13.7
Post and Telecommunications Services	17.9	16.1
Department of Correctional Services	73.7	81.8
Agriculture (RADA)	35.1	40.6
Ministry of Science, Technology, Energy and Mining (E-Learning)	90.3	82.1
Justice Training Institute	35.9	39.6
Training (MOFP) Scholarships and Assistance	85.0	85.0
Inservice Training (MLSS)	5.4	4.5
Social Intervention Programme/Special Youth Employment Training (MLSS)	80.6	87.5
Ministry of Industry Investment and Commerce	7.7	7.6
Abilities Foundation (MLSS)	8.0	9.6
Sub-Total	20 303.1	19 727.8
HEART Trust/National Training Agency	7 850	8 400
TOTAL	28 153.1	28 127.8

Source: Human Employment and Resource Training Trust/National Training Agency
and Estimates of Expenditures, 2014/2015

Authority's Clean School Competition which engaged children from 152 institutions in clean-up activities, as well as recycling and beautification projects at their school. Other major educational initiatives included collaboration with MoE to construct a new classroom block at Norwich Primary School in Port Antonio, Portland, to replace a 21-year-old wooden structure which was destroyed by Hurricane Sandy in 2012. The Scotia Foundation also continued to sponsor nutrition through its Breakfast Feeding Programme in seven schools, benefiting some 3 500 children.

Grace Kennedy Foundation

For the FY 2013/14, the Grace & Staff Community Development Foundation spent a total of \$55.1 million on educational initiatives. The Grace Kennedy Foundation awarded seven full scholarships to undergraduate students attending UWI, UTech and Edna Manley College of the Visual and Performing Arts. The Foundation awarded two final year bursaries to the Caribbean Maritime Institute; six final year bursaries to UWI, and three final year bursaries to UTech. The Foundation presented 26 other bursaries to students attending UWI, and UTech to assist with their tuition and

living expenses. It also spent \$18.0 million on scholarships and bursaries assisting 44 other students.

Digicel Foundation

The Digicel Foundation funded three projects in the 2013/14 FY. These included the Enrichment Programme which aims to improve reading levels of students in Grades I–III. The Foundation expended \$67.8 million in 35 schools with some 11 983 students benefiting. Digicel Foundation donated \$11.4 million to increase ICT access to 210 school at all levels through Project 1000, approximately 21 000 students benefited. A donation of \$38.8 million was made to the Mobile Science Pilot towards promoting science and ICT education in 17 schools with some 15 300 students benefiting from these activities.

SECTION 2: POLICIES, PROGRAMME & PROJECTS

The Ministry of Education is the executive body entrusted with the responsibility for the provision of education in Jamaica. It receives support for the delivery of education and training through 10 portfolio agencies.

As part of its mandate to improve performance by creating systems for greater accountability and improving the quality of delivery of education at all levels, the MoE under the Education System Transformation Programme (ESTP) continued to provide policy and programme reform. Table 22.2 shows selected education policies and their status during the last academic year.

Education Transformation

The Education System Transformation Programme (ESTP), a functionary of the MoE, has a mandate to implement the recommendations of the National Task Force on Educational Reform. The activities of the ESTP were carried out through six work streams. The cumulative achievements for 2014 are listed below:

Curriculum Teaching & Learning – the objectives are for improved teaching and learning, curricularization of the CSEC syllabi, improved student performance at the primary level, the lower secondary; and at CSEC. The following were developments under Curriculum Teaching & Learning component:

- A National Comprehensive Literacy programme was delivered with a full suite of material to support teaching and learning of literacy for all grades up to the end of the primary level. Literacy coaches along with literacy specialists provided targeted intervention to schools identified as low performing and a similar provision was made for numeracy, including material to support the National Comprehensive Numeracy Programme. Oversight of the programme was provided by a National Advisory Committee.
- Alternative Secondary Transitional Education Programme (ASTEP) was implemented to treat with students who at the end of primary school had not achieved mastery in literacy at the Grade 4 level. The ASTEP was evaluated and a number of issues highlighted resulting in the development of a new inclusive approach to treat with these students.

The activities of this component are directly related to improvements in literacy mastery in 2014 at Grade Four, attaining a high of 77.2 per cent. Performance of boys, however, still lags behind girls.

Behaviour and Community – with the objective of improving behaviour management, citizenship and safety, and security in schools, this initiative was fully integrated into the work of the MoE. Achievements included the implementation of the Citizenship Education Programme (CEP) in schools, the integration of strategies such as Team Teach and Autism-Pro to better treat with students exhibiting maladaptive behaviour. **Safety and Security** manuals were developed and the programme implemented in secondary schools. The Policy was drafted and consultations commenced.

Special Education – with the aim of addressing the needs of the sub-sector, the following were undertaken:

- a School to Work Transition programme was scheduled for implementation
- “Child Find” (identification of students with special needs) was completed with over 7 000 students assessed across all regions. A comprehensive report of the findings was prepared
- the Professional Registry was prepared with approximately 360 registrants covering a wide range of specializations
- training support for educators to identify and treat with autism was done and rolled-out to schools
- training in positive behaviour support for school-wide discipline was done and integrated in the Ministry’s School-Wide Positive Behaviour Intervention and Support (SWPBIS) behaviour management programme
- Alternative Programme for Exceptional Children (APEX), a programme for the gifted and talented was developed for introduction at the secondary and tertiary levels of the system
- the concept for the introduction of alternative pathways at the secondary level was developed and curricula to support instruction for students with special learning needs were initiated.

The **Jamaica Teaching Council (JTC)** continued to fulfil its mandate to regulate and promote the teaching profession. Achievements included:

- the drafting of standards for the profession which will be used to licence teachers
- the establishment of the mentorship programme—an important condition for licensing of new teachers
- hosting of a forum for innovations in teaching
- development and documentation of operational procedures inclusive of licensing
- preparation of Legislation and a discussion bill — drafting instructions for resubmission finalised.

In fulfilment of its mandate to provide an effective and efficient school support system, management of educational services delivery at the regional level for improved school performance, and improved accountability, the MoE continued activities in the following areas:

- Organisational Development (OD) work was advanced and monitored by the Modernization Management Team (MMT). Support was provided by Business Process Re-engineering (BPR) Specialists to ensure an efficient structure and process from the transitioning of the Ministry into a policy-focused Central Ministry and is operational arm, the Department of School Services
- at least one Teacher Resource Centres (TRCs) was established and resourced in each Quality Education Circle (QEC)
- work in progress to undertake an institutional analysis of schools to determine governance structure and fit with the demands placed on them
- in collaboration with the National Council on Education (NCE), training of 4 000 board members was conducted to prepare them for the demands of the modernized Ministry.

National Education Trust (NET) – with the aim of attracting endowment and enabling investment in education, the activities of NET were focused on defining a business model, while undertaking management of infrastructure projects on behalf of the MoE. Work commenced on the marketing of the entity.

National College for Educational Leadership (NCEL) – in an effort to develop the educational leadership capacity, 529 education leaders/managers were trained. The Aspiring Principals Qualification Programme commenced in 2014 with 38 aspirants enrolled in the programme.

Jamaica Tertiary Education Commission (J-TEC) – to fulfil its mandate to provide regulatory oversight to the Tertiary sector, legislation was drafted and consultations held. The Bill was with the Chief Parliamentary Council (CPC) for the preparation of a discussion draft. Cabinet approved the start-up of voluntary registration of tertiary institutions. The Commission also developed a National Qualifications Framework (NQF) which is being reviewed (see Section 6: Regulatory, for additional information on J-TEC).

National Parenting Support Commission (NPSC) – the operation of the Commission commenced and was supported by the Parenting Bill. The NPSC hosted parent month activities in November and supported over 100 Parent Places which were established. There has been an increased demand for its services.

National Education Inspectorate (NEI) – the National Education Inspectorate (NEI) trained 26 new inspectors with background in Special Education and hosted a Special Education workshop where 20 active inspectors were trained, taking the number of active school inspectors to 168. In addition, 11 new team leaders and 12 active team leaders were trained to support school inspections. In February 2014,

Senior Education Officers were trained in the NEI Framework and in August the NEI had three refresher workshops for 102 contract inspectors across the island. The NEI conducted 129 school inspections bringing the total number of schools inspected since inception in 2013 to 889 (93.0 per cent of public schools).

In collaboration with the Education Services Division (ESD) and the Overseas Examinations Commission (OEC), an evaluation instrument to monitor the production of School-Based Assessments was designed and pre-piloted in 28 schools. The NEI also collaborated with the ESD to develop a model for sustaining school improvement for middle managers, which was piloted at selected high schools. Cambridge Education was contracted to provide technical assistance for the design and development of a School Inspection System.

OTHER EDUCATIONAL SUPPORT PROGRAMME, PROJECTS AND SERVICES

Jamaican Foundation for Lifelong Learning (JFLL)

The Jamaican Foundation for Lifelong Learning has as its mandate the provision of adult basic and adult secondary education. During the year, its major focus was the development and implementation of the High School Equivalency Programme which targets school drop-outs, the uncertified school leavers, the unattached youth, and the unskilled and unqualified workers.

Programme Development & Delivery

The Foundation curriculum was reviewed and re-written to inform the development of adult basic education component for **High School Diploma Equivalency (HSDE)** Programme in four distinct disciplines—Mathematics, English Language, Life Skills and Information Communication Technology. The modular HSDE is a general education programme that targets adult learners from limited literacy and transitions them along the Grades 1–11 standards to ultimately attain their high school matriculation requirements of five Caribbean Secondary Education Certification subjects, including, Mathematics and English Language. The HSDE is comprised of three tiers—Basic Level (Grades 1–6); Intermediate (Grades 7–9) and Proficiency (Grade 10–11) content equivalency with the formal education system. The programme is delivered across the JFLL learning network over an academic year of 40 instructional weeks or 290 days. The HSDE has been customized to meet the needs of the workplace and community-based interventions. Current HSDE partnership includes:

- Jamaica Social Invest Fund–JFLL/Bridge Jamaica Project
- Planning Institute of Jamaica (PIOJ)/Citizens Security and Justice Programme (CSJP)– Majesty Gardens
- Jones Town (Adult Education Centre)

TABLE 22.2
MINISTRY OF EDUCATION POLICIES AND STATUS

Name	Purpose	Comments/Next Steps/Current Status
Safe Schools Policy	To provide schools with policy guidelines directed at securing children at school and addressing issues of security in schools.	Policy submitted for approval by Cabinet
Compulsory Education Policy	The policy is designed to support the mandatory engagement of all children between the ages of 3 and 18 years. It addresses regular attendance at learning institutions as well as exposure to both academic and vocational programme at the secondary level.	Policy Document being prepared; the policy is being reviewed in light of the right afforded under the Charter of Rights for every child (Jamaican Citizen) to receive publicly funded tuition to the primary level and to articulate clearly the concept of the Career Advancement Programme (CAP) and other programmes.
Special Education Policy	To guide the implementation of the special education mandate of ensuring adequate and appropriate provisions that will ensure access and equity, in the planning and delivery of special education services	Public Consultation in progress; the Draft has been revised pending discussions with the Ministry's legal department. The Implementation plan to be revised
National Lifelong Learning Policy	To foster a climate that allows for continuous engagement by the population with knowledge and skills acquisition, leading to enhanced personal and national productivity and employability as well as active citizenship, strong families, healthy population and personal fulfilment	Policy Document being prepared, the draft document is being revised. Further dialogue is being held as to whether or not the national career development initiative is to be included in this policy or to stand alone as a separate policy document
National Play Policy	This policy is in keeping with the Convention on the Rights of the Child. It also supports the new child-centred play based on national early childhood curriculum	Policy Document being prepared
National Curriculum Policy	To create a regulatory framework that will provide clear and specific guidelines that will result in the development and implementation of curricula of the highest quality	Public Consultation in progress; further consultations on the drafting of the policy document are to be done (no change) The Grades 1–9 curricula are being revised. The Policy is being reviewed internally, to include standards for primary and secondary education
National Policy for HIV/AIDS Management in Schools	To guide the management of HIV/AIDS within educational institutions in order to promote effective prevention and care within the context of the education system	Public Consultation in progress
National Policy on Independent Schools	This will provide a broad-based framework to guide operations and governance of the independent (Private) educational institutions in Jamaica, outlining registration procedures, accreditation and supervision	Public Consultation in progress, the draft policy is being amended
National School Feeding Policy	To provide good nutrition for physical, social and cognitive development of students thereby increasing their ability to participate in learning activities. Additionally, the policy aims at the standardization of the School Feeding Programme and regularization of programme procedures	Policy Document and a Cabinet Submission are being prepared. The legal and financial implications are being finalised for inclusion into the documents.
The National Guidance and Counselling Policy	To promote access to guidance and counselling programme as a fundamental right of all children of formal school age. It will focus on personal and social development, career education and the development of healthy life styles leading to the holistic development of the students	Policy Document being prepared; an initial review of the policy was done internally, the policy is to be reviewed
School Improvement & Special Measures Policy	To make provision for mandatory national standards and performance measures for primary and secondary education: (a) the school improvement planning process and the Department of School Services (DSS's) role in same; and (b) "Special Measures" — direct intervention and support by DSS in the administration, management and operation of public schools failing to meet prescribed performance criteria	Cabinet Office advised of intention to create policy; Legislative and Policy Proposal are being developed. Stakeholders' consultations in progress

- Office of the Prime Minister
- Sugar Transformation Unit
- Jamaica Biscuit Company
- McIntyre Villa Community
- Tastee Jamaica
- Toyota Jamaica

The HSDE has also been tailored for the Career Advancement Programme General Stream learners and was delivered in 27 selected high schools across the island.

Assessment and Certification

JFLL partnered with California Testing Bureau and McGraw–Hill to acquire adult basic educational instructional materials and on–line and paper–based assessment tool called Test of Adult Basic Education (TABE). Efforts are being advanced to have JFLL develop the HSDE Programme Instructional Materials comprising of Curricula, Teachers’ Guides, Student Texts and Workbooks and Compact Discs. This will become a source of income generation for the organization.

The HSDE has been internationally benchmarked to the Caribbean Examination Council (CXC). The Diploma has also been given recognition by the Office of Adult and Continuing Education in New York, the largest provider of adult education in America.

Partnerships were secured with HEART/Trust NTA, Ministry of Education, E–Learning, and the CXC to acquire additional instructional materials to support the programme at the Intermediate (Grades 7–9) and Proficiency (Grades 10 and 11) Levels; develop the first National Diagnostic Assessment and Referral system (NDAR); and develop instructional materials and provide of technical support.

Capacity Building: A total of 205 facilitators, parish managers, and support staff were trained at the Summer Institute. Participants were instructed in the art and science of teaching the adult learner, how to plan and deliver the new adult education curricula, and how to use data to guide instruction. As at the end of the year enrolment was 3 834 (61.8 per cent male) across the 29 adult education centres. This represents 78.5 per cent of the current operating capacity of the learning network. JFLL had a 60.0 per cent pass rate of its learners who sat CSEC subjects in 2014.

National Parent Teacher Association of Jamaica

The National Parent–Teacher Association (NPTA) of Jamaica conducted four training sessions aimed at sensitizing PTA Presidents of their roles and functions, increasing membership, providing members with knowledge on how to create news releases, conduct media interviews, and promote their regional activities. Over 100 participants were sensitized

and 27 participants trained. The Association also hosted its 7th Annual Conference on November 2014.

National Council on Education

The National Council on Education (NCE) is responsible for recommending nominees to serve on the boards of management of approximately 1 022 public educational institutions. During the year, the Council had an increase in the number of school boards with unresolved governance–related issues. These issues have negatively impacted the operations of a number of schools and, as a result, a School Board Review Committee was established. The overall objective of the Committee was to identify workable solutions and ensure the timely resolution of governance–related issues.

The training of school board members continued with approximately \$5.0 million invested to support the training of 1 394 board members representing 434 public educational institutions. The members were trained in 13 sessions held in Regions 3, 5 and 6 comprising the parishes of St. Ann, Trelawny, St. Elizabeth, Manchester, Clarendon and St. Catherine.

The Council completed two major assignments which commenced in 2013—the review of the 1980 Education Regulations and a comprehensive review of the Jamaica Teaching Council (JTC) Bill. The finalized draft revised Education Regulations, 2014, was submitted to the MOE in May 2014. A similar process was completed for the JTC Bill.

The Jamaica Library Service

The Jamaica Library Service provided various programmes and services through its public and school library networks to satisfy the information and recreational needs of its users.

Coverage

As at March 2014, the Public Library Network consisted of 516 Service Points, 510 of which were operational. The School Library Network consisted of 926 School Libraries, 835 of which were operational. The school libraries that were operational (i.e. active or partially active) at March 31, 2014 were: Infant (27); Primary (523); All–Age (98); Primary & Junior High (78); Secondary High (97); Technical High (8); and Special (4). The School Library Network fulfilled its mandate through visiting schools to assess libraries, conducting stock counts, supplying resource material to enhance library collections, reorganizing collections, training for library personnel, administering outreach programmes and carrying out other routine operations. A total of 703 visits were made to 580 Infant, Primary, All Age, Primary and Junior High Schools in FY 2013/14 compared with 785 visits to 592 schools in the previous year. Visits to 104 high school libraries totalled 131 in comparison to the 213 visits to 121 high schools during the previous year.

Registered membership throughout the Public Library Network at March, 2014 was 499 597 comprising 293 931 juniors (ages 4–15 yrs) and 205 666 adults (over 15 yrs

old). At the end of FY 2013/14, a total of 14 410 volumes were acquired—1 666 purchased and 12 744 received as donations. Stock in the island-wide public library collection totalled 680 703.

Reference and research were the main circulation activities, with a total of 1 857 663 consultations for the year. This reflected a decline of 198 467 or 9.6 per cent compared with the 2 056 130 consultations in 2012/13. Material borrowed for home loans totalled 516 361, including 559 audiovisual items compared with 541 963 for 2012/13. In support of an information-literate and technology-enabled society, users of the library facilities continued to make use of the provision of free access to computers and the Internet. Forty-one public libraries had access to internet access to public library users and this was available at 22 locations islandwide. A total of 630 functional computers were available for use.

Programmes and Outreach Activities

The National Reading Competition and National Reading Fair were held under the theme: “*On Your Marks, Get Set, Read!*”. The Summer Programme specifically targeted juniors 6–14 years, and was held for varying periods between July and August in parish library networks islandwide under the theme: “*On Your Marks, Get Set: Summer Race to Success.*”

Three hundred and seventy-two communities without fixed library locations were provided with a mobile library service. In the absence of the designated mobile library units, as a result of an aged fleet, the service was provided only in the parishes of Portland, Trelawny and Westmoreland.

Information and Communication Technology (ICT) Services

A grant agreement was signed between the Jamaica Library Board and the Bill & Melinda Gates Foundation in November, 2013. By providing up-to-date computer hardware and software in 127 public libraries, the project will impact the areas of digital inclusion and education, thereby enabling public libraries to make a major contribution to the Vision 2030 Jamaica national goal, *to empower Jamaicans to achieve their fullest potential.*

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 greater and more 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*** – Nutrition Products Limited, an Agency of the MOE, 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 137 000 beneficiaries each day. The cost of a Nutribun snack (solid and liquid) is \$2.00. Some 4 000 additional beneficiaries were added to the breakfast programme in the parishes of St. Thomas, St. Catherine and Clarendon. This is in addition to the 8 000 beneficiaries in the Region 1 Pilot in Kingston & St. Andrew. As part of the breakfast programme, carrot and banana muffins/breads, fruit juice drink, and a variety of porridge and sandwiches were added to the programme.
- ***The Traditional Cooked Lunch Component*** – facilitated the provision of cooked meals for approximately 175 000 beneficiaries in 636 schools. The Ministry paid a subsidy of \$450.00 per capita per annum and also supplied commodities⁴ to supplement the programme. Students contributed between \$30.00 and \$170.00 per meal which, along with the subsidy from the Ministry, was used to assist in paying cooks, purchasing cooking gas, protein and other necessities for meals. The ECC also provides budgetary support in the form of a Nutrition Subsidy at the rate of \$250.00 per capita for children in Recognized Basic Schools. The commodities were also provided for 86 000 children in these recognized Basic Schools. Under the programme, 70.0 per cent of the Early Childhood cohort and PATH beneficiaries were targeted.
- ***The PATH Nutritional Support Programme*** – targeted children and PATH beneficiaries aged 3–8 years in basic schools, infant schools and infant departments who received breakfast and lunch ‘free’ of cost. In 2014, administrative changes allowed for PATH beneficiaries aged 9–18 years in Grades 4–13 at the upper primary and secondary levels to continue

4. Rice; Flour; Cornmeal; Vegetable Oil; Corned Beef; Tinned Jack Mackerel

to receive a free lunch three days per week, however, parents were asked to bear the cost of the lunches for the other two days. Rice is the only commodity which was purchased centrally and sent to schools.

GoJ/IDB 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 modernizing and upgrading its managerial tool kit and organizational structure, and generating evidence to improve the nutritional quality and efficiency of its snack component.

The following activities were undertaken:

- consultants hired to review and summarize all studies conducted, prepare a report and conduct an end of project evaluation
- The School Feeding Policy document along with the Strategic Plan and budgetary implications was finalized and submitted to the Ministry of Finance for review and approval before final submission to Cabinet. The piloting of the meal production and delivery options continued in Region 1 with emphasis on the on-site option.

Guidance and Counselling

The MoE's Guidance and Counselling Unit began implementing an **Early Detection Support and Intervention (EDSI) System**. This will articulate legislation, policy and standards into professional practice and service delivery, and coordinate Units within the MOE whose portfolio include programme and activities for student support, with the aim to safeguard the well-being of at-risk students.

The major activities included the:

- Pilot of a GoJ/UNICEF School-Wide Positive Behaviour Intervention and Support (SWPBIS) Framework in 56 schools. SWPBIS is a comprehensive framework for implementing management systems, projects and programmes that will improve student behaviour and assist school staff to transform the psycho-social school environment. A total of 138 participants were trained in workshops for the training of trainers and coaches, and school teams to implement Tier 1 of the SWPBIS Framework
- **National Guidance and Counselling Policy** which was finalized and approved internally by the MOE
- distribution of 6 000 copies of the **National Policy for the Re-integration of School-Aged Mothers** to schools; Ministries, Departments, Agencies; Faith-Based Organizations; Public Libraries and

libraries of tertiary educational institutions; NGOs; and International Development Partners (UNICEF, UNFPA, Global Funds). Two Regional Sensitization Seminars were conducted with board chairs, principals, guidance counsellors, parents and students of schools in Regions I and IV

- General Psychosocial Services and Sexual and Reproductive Health Services (CLASS_H) were piloted in 56 schools up to December 2014.

There was also the continuation of the Health and Family Life Education (HFLE)/HIV and Aids Programme. Highlights from this included:

- HFLE Training Workshops and HIV/AIDS awareness events which were conducted in all six (6) regions with over 1700 principals, teachers and students from primary and secondary level institutions
- the recruitment of a consultant to conduct an assessment of the HFLE Programme in teacher training institutions through support from United Nations Population Fund (UNFPA). The objective of the consultancy is to assess the adequacy of the HFLE Course(s) in eight Teacher Training Colleges to prepare teachers to deliver the MoE's life-skills based HFLE Curriculum.

EDUCATION PROJECTS

E-Learning Jamaica (e-LJam)

E-Learning Jamaica (e-LJam) continued on its quest to facilitate the development of a knowledge-based society by using ICT methodologies. This is being realized through the Tablets in School (TIS) project and the E-Learning Jamaica High School Project.

In November 2013, Cabinet approved the allocation of \$1.4 billion from the Universal Service Fund (USF) for the development and implementation of an e-Learning TIS pilot project. The Pilot delivered 25 000 tablet devices to students and teachers in 38 institutions across the island. It also provided access to curriculum-based apps, e-books and web resources, and trained teachers in the schools in tablet integration & facilitators in learning centres.

The Pilot included six Basic and Infant Schools, 13 Primary Schools, six All-Age and Junior High Schools, 11 Secondary High Schools, one Special school for children with disabilities, as well as one teacher training institution, making a total of 38 institutions. Parents and guardians were required to sign pledge forms before tablets were distributed to students. The plan is for an extension of the pilot to another 50 schools. The project is being implemented by e-LJam in collaboration with the major partners Ministry of Science, Technology, Energy and Mining (MSTEM), MOE and USF.

The e-learning High School Project continued with the provision of instructional materials, teacher training

intervention, remedial intervention and continuous assessment to 203 public and private educational institutions. Some achievements for the period included the:

- development and review of teacher and student instructional material for Information Technology
- completion of animation of previously developed content
- development of Mathematics materials for JFLL High School Diploma Programme
- completion of fixed whiteboard installation
- training of 400 teachers in Technology Integration
- hiring of a project evaluation contractor

USAID/MOE Education Partnership for Improved Reading Outcomes (2013–2016)

The USAID and the MOE are jointly implementing the Government to Government (G2G) activity, USAID/MOE Education Partnership for Improved Reading Outcomes. Under the MOE's National Comprehensive Literacy Programme, the primary goal of the activity is to provide capacity building and technical assistance to Jamaica's National Literacy Programme through a comprehensive reading programme in 450 primary level schools. One of the initiatives is the provision of 90 Reading Coaches to assist the MoE to reach its target of 85.0 per cent of students reading at grade level by 2015 and to facilitate sustainability in the use of the Literacy 1–2–3 methodology, which is being emphasized as the national format for literacy instruction in public schools. The aim is for the Reading Coaches to work with the National Literacy Team to provide direct assistance to teachers, thus enabling them to support the Grades 1–3 students in the education system.

The programme trained 759 principals and school administrators to improve students' performance in reading in the early Grades (1–3). Training included: management of literacy instruction; preparation of School Improvement Plans (SIPs) to include literacy components; training in parental involvement in improving literacy; and training in the use of 'Principal's Walkthrough'. Some 2 886 (93.9 per cent females) were trained in the fundamentals of literacy instruction, particularly phonological awareness; phonics and vocabulary instruction; and the re-introduction of the prescribed model lesson plan format.

USAID/Jamaica also supported an Enrichment Initiative (EI) in collaboration with the Digicel Foundation (DF). EI is an islandwide Information and Communication Technology (ICT) partnership with the MOE in support of literacy for Grades 1–3. The project's design twins technology and more individualized instruction for students who are having

extreme difficulties in achieving their grade level in reading. Assessments are also used to ascertain current reading levels and progress made as well as any special learning needs or challenges students may have. Digicel established 11 Enrichment Centres (ECs), retrofitted self-contained classrooms equipped with computer-based teaching aids, interactive whiteboards, and computers loaded with literacy software. They also installed 60 Mobile Enrichment Carts (MECs) containing all the requisite materials that are wheeled into classrooms. Some 14 439 students have benefited from the ECs and MECs. DF also engaged parents to support and sustain student's performance and trained 60 teachers and principals to manage and administer the intervention in the selected school.

A publication entitled, *Closing the Gender Gap – a Guide for Improving the Literacy Performance of Boys and Girls at the Primary Level*, was developed, printed and distributed to schools. The project team also prepared guidelines for writing lesson plans to include taking gender considerations into account and a sample lesson plan modified to reflect gender-related issues. The project continued to strengthen the parent/school partnerships and established 35 Parents' Places bringing the total in the school system to 95.

Jamaica Social Investment Fund (JSIF)

The Jamaica Social Investment Fund (JSIF) approved funding for 49 educational related sub-projects. Sixteen of these were for basic infrastructure (which included construction, rehabilitation and fencing of schools, and construction of sanitation blocks to replace pit latrines in rural schools); 25 were education/training interventions and capacity building for community groups; and eight provided equipment and/or furniture in addition to fencing educational facilities. Ninety-five education-related, training and capacity building sub-projects were also completed.

There was also the rehabilitation of three primary schools (one with an infant department), fencing, and the provision of equipment to four Primary schools and one All-Age school. Sanitation blocks were constructed for facilities in rural areas which previously only had access to pit latrines—this was undertaken for one Primary school, one All-Age school and a Primary school with an Infant Department—benefiting 966 persons. One skills training centre was built for an estimated 41 persons. JSIF also funded educational related socio-economic projects including 13 sub-projects in Education Training Programmes to support the mandate of poverty reduction. This was done through the provision of education and marketable skills training for approximately 2 779 children, youth and adult learners. There was also a life coping skills component which included seven sub-projects which provided exposure to life coping skills such as conflict resolution and parenting. Capacity building and education/training were provided through 20 sub-projects which exposed participants to specialized farming/business

TABLE 22.3
ENROLMENT IN EARLY CHILDHOOD EDUCATION BY SCHOOL TYPE AND YEAR, 2009/10–2013/14

YEAR	Infant School		Infant Department		Basic School				TOTAL
	No.	Enrolment	No.	Enrolment	Recognized		Unrecognized ^a		
					No.	Enrolment	No.	Enrolment	
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
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	n/ap	n/ap	146 410
2013/14	35	8 338	156	7 236	1 942	84 811	903	21 987^b	122 372

a - Category Unrecognized no longer exists (2012/13)

b - These are students enrolled in private day care centres, pre-school, special schools and nursery/preparatory schools

n/ap - not applicable

Source: Statistics Section, Ministry of Education & Early Childhood Commission Registration Information System

techniques. Approximately 1 318 persons were trained in these skill areas.

SECTION 3: PERFORMANCE

Early Childhood Development (ECD)

ECD programmes target children 0–8 years old. These include programmes for children 0–3 years, the majority of whom are not in early childhood institutions but accessed state health services; children 3–5 years, many of whom attend Early Childhood Institutions (ECIs); and children 6–8 years, who attend primary level schools which are governed by the Education Act.

ECD programmes were offered in 2 936⁵ Basic and Infant Schools & Departments, and Kindergarten Departments of preparatory schools for children aged 3–5 years. Preliminary data⁶ from the Early Childhood Commission (ECC) and the MoE Statistics Unit indicated that a total of 122 372 students in the 3–5 age cohort were enrolled in ECIs (Table 22.3). The *Jamaica Survey of Living Conditions (JSLC) 2012* indicated that there continued to be high levels of enrolment with a gross enrolment rate⁷ of 99.9 per cent (100.0 per cent for boys and 99.7 per cent girls). The ECE level was served by 9 978 teachers⁸, with average pupil to teacher ratio of 12:1. Of the number of practitioners, 52.0 per cent had vocational qualifications; 14.5 per cent, a diploma in teacher education; 8.0 per cent a bachelor's degree; 1.0 per cent trained at the

masters level; and 24.5 per cent of the teachers were untrained. Data on attendance in public schools for 2013/14, indicated an average daily attendance of 79.4 per cent (80.2 per cent female, 78.6 per cent male).

Major Developments

The Early Childhood Commission (ECC) began the first year of its second comprehensive cross-sectoral National Strategic Plan (NSP) for ECD. The five-year NSP commenced in 2013, with strategic objectives or key processes in the areas of parenting; effective preventive health care; screening; early identification and referral of at-risk children and households; safe, learner-centred, high quality early childhood institutions; and effective curriculum delivery by trained early childhood practitioners.

The ECC collaborated with the MOE to make adjustments to existing facilities at the primary level to accommodate children at the early childhood level. The rationalization process involved transforming 193 basic schools into 17 infant schools and 76 infant departments. Of the approved Infant Schools and Departments, 30 began operating in September 2013, and increased to 68 by December 2014.

The *Trained Teacher Volunteer Programme*, a component of the Jamaica Emergency Employment Programme (JEEP), Phase 2, trained and employed 101 practitioners. The Regional

5. This does not include Recognized Day Care Centres catering for the 0–3 age cohort and institutions for children with special needs at this level.

6. At the time of reporting, February 2015, data from Region II was still outstanding

7. 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.

8. The total does not include teachers in private preparatory schools

Early Childhood Services Supervisors of the ECC coordinated and oversaw the convening of sensitization sessions and training for the Primary school trained teachers on the Jamaica Early Childhood Curriculum and requirements for working with, and planning for children within the 3–5 age group. Of the 108 volunteers, 27 of them obtained employment. The contracts for the volunteers ended in July 2014.

ECC Inspectors and Development Officers, in tandem with the school administrators, worked to create development plans to meet the requirements of inspection reports. To date, 44 Development Officers were trained on the new development plan template to be used by all early childhood institutions.

Insights is an evidence-based intervention that enhances the self-regulation and academic skills of young children and the care giving and disciplinary skills of their parents and teachers. The ECC trained teachers, parents and children in the programme at seven schools in the corporate area.

The **Advanced Childhood Education Programme (ACEP)** continued to improve the levels of literacy, numeracy and general preparedness for learning among children ages 3–6 years old from 59 ECIs in Jamaica's operating areas in Clarendon and Manchester. For the period under review, 75 Early Childhood Practitioners (ECPs) received training from Mico University College.

In relation to the improvement and expansion of Early Childhood Education, ECC made significant progress in:

- the assessment and certification of parenting education and support programmes to ensure the quality of parenting information that is available at the community level. Using a directory of 92 active programmes identified by ECC field workers, 30.0 per cent of all early childhood parenting education and support programmes were certified based on the established standards and 41.0 per cent of parenting education and support programmes assessed
- six hundred and eighty-five inspections were conducted at early childhood institutions, in keeping with the ECC Act and Regulations to inspect institutions for quality assurance
- the Development Officers made 2 473 institutional visits and administered the classroom observation tool (COT) in 1 536 classrooms serving children ages

3–6. Some 424 visits were made to day care centres in which the development officers provided coaching and stimulation demonstrations.

For the collective benefit of approximately 418 children and staff, JSIF constructed and rehabilitated six basic and infant schools. Fencing and furniture & equipment were provided to four basic schools.

The CHASE Fund supported early childhood under the following components:

- **Research** – expended \$11.1 million to support the Insights programme at the School of Education, UWI and the attendance of EC personnel to the Association for Supervision & Curriculum Development Conference
- **Equipping and Upgrading Basic Schools** – approximately \$112.4 million was expended to support 32 basic schools islandwide, benefiting 2 362 students
- **Building Basic Schools and Resource Centres** – some \$79.5 million was expended to develop Old Road Basic School in Clarendon and a model ECI facility at the Caribbean Child Development Centre, UWI, benefiting 175 students.
- **Training** – some 300 students received scholarships to pursue early childhood education programmes islandwide at a cost of \$60.7 million. An additional 200 early childhood personnel were assisted to attend the annual Dudley Grant Memorial Trust Conference.

PRIMARY EDUCATION⁹

Primary school enrolment was 257 460, a decline of 4.5 per cent decline compared with 2012/13 (Table 22.4). 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 791 public schools was 239 455 and an estimated 18 005¹⁰ were enrolled in 281 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.¹¹ In the public school system, males accounted for 51.3 per cent of the student population.

9. 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.

10. Based on estimates in the *Jamaica Survey of Living Condition (JSLC) 2012*

11. The Net Enrolment Rate was 92.1 per cent—Boys, 91.4 per cent and Girls, 92.7 per cent (JSLC 2012). Information provided by the MOE Statistics Unit on public schools indicated a gross enrolment rate of 100.0 per cent with a net enrolment rate of 93.7 per cent.

TABLE 22.4
PRIMARY LEVEL STUDENT ENROLMENT BY TYPE OF SCHOOL, 2011/12–2013/14

	2011/12			2012/13			2013/14		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Primary (Grade 1–6)	99 080	96 134	195 214	97 206	92 980	190 186	94 614	91 351	185 965
All Age (Grades 1–6)	13 366	12 233	25 599	13 006	11 670	24 676	12 486	10 952	23 438
Prim & Junior High (Grades 1–6)	17 045	15 382	32 427	16 439	14 804	31 243	15 770	14 282	30 052
Sub Total	129 491	123 749	253 240	126 651	119 454	246 105	122 870	116 585	239 455
Preparatory a	15 538	14 849	30 388	12 032	11 348	23 380	8 974	9 031	18 005
Total	145 029	138 598	283 628	138 683	130 802	269 485	131 844	125 616	257 460

a – Estimated, *Jamaica Survey of Living Conditions 2008–2010*

Source: Statistics Section, Ministry of Education

TABLE 22.5
TEACHERS EMPLOYED IN PUBLIC SECTOR SCHOOLS BY TYPE OF SCHOOL AND QUALIFICATION, 2012/13–2013/14

SCHOOL TYPE	2012/13						2013/14					
	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	393	354	12	4	25	788	467	311	17	5	22	822
SUBTOTAL	393	354	12	4	25	788	467	311	17	5	22	822
Grades 1–6												
Primary	4 373	3 250	155	91	271	8 140	4 842	2 630	143	61	134	7 810
All-Age	578	396	10	12	30	1 026	698	312	13	7	15	1 045
Primary and Junior High	809	492	19	5	31	1 356	898	383	13	7	19	1 320
SUBTOTAL	5 760	4 138	184	108	332	10 522	6 438	3 325	169	75	168	10 175
Grades 7–9												
All-Age	275	146	17	14	14	466	220	88	8	12	6	334
Primary and Junior High	684	392	43	29	28	1 176	671	300	39	21	18	1 049
Secondary High	5 339	3 512	1 086	362	444	10 743	5 641	3 163	1 022	322	397	10 545
Technical High	590	381	96	55	51	1 173	656	90	339	44	31	1 160
Vocational/Agricultural (Grades 12–13)	12	8	5	8	3	36	15	5	5	10	1	36
SUBTOTAL	6 900	4 439	1 247	468	540	13 594	7 203	3 646	1 413	409	453	13 124
TOTAL	13 053	8 931	1 443	580	897	24 904	14 108	7 282	1 599	489	643	24 121

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 average daily attendance rate for the public primary was 86.8 per cent. The attendance level for girls was 87.3 per cent compared with 86.0 per cent for boys. The national target of the MoE is 95.0 per cent.

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 24:1. 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

10 175 compared with 10 522 in the 2012/13 school year (Table 22.5). Approximately 96.0 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 63.3 per cent (6 438 teachers) in 2013/14 from 36.1 per cent (3 888 teachers) in 2010. Consistent with previous years, the teaching profession continued to be dominated by females at the Primary level, accounting for 88.5 per cent of the total.

The Grade Four Literacy Test (GFLT)

In June 2014, a total of 50 027 students sat the Test from public, private and special schools. Of this number, 41 188 sat the Test for the first time (37 142 from public schools, 4 013 from private schools and 33 from special schools). Some 77.2 per cent of the students from public and private schools achieved mastery; 17.6 per cent achieved almost mastery and 5.2 per cent non-mastery. Of those students who achieved mastery, 55.4 per cent were females. Approximately 46.0 per cent or 15 students from special schools achieved mastery. Males and females performed equally in achieving mastery at 45.5 per cent in these schools. Of the 791 public schools, 787 entered 37 142 students to sit the test with approximately 75.0 per cent (55.8 per cent, female) attained mastery¹²; some 19.0 per cent attained almost mastery and 6.0 per cent non-mastery.

Private schools (236) with a population of 4 013 students had 95.0 per cent mastery, 4.5 per cent almost mastery, and 0.5 per cent non-mastery. The percentage of the students achieving mastery was 94.0 per cent in the previous academic year. Some 97.5 per cent of females and 92.5 per cent of males achieved mastery.

Grade Four Numeracy Test (GFNT)

In June 2014, a total of 41 013 students sat the Test—36 975 from public schools, 4 006 from private schools, and 32 from special schools. Approximately 58.0 per cent of the 40 981 students from public and private schools achieved mastery (same as in 2013), 28.0 per cent achieved almost mastery, and 14.0 per cent non-mastery. Of those who achieved mastery, 56.1 per cent were females. Thirty-two

students sat from special schools and achieved mastery level of approximately 16.0 per cent.

Public schools entered 36 975 students to sit the Test, approximately 54.0 per cent attained mastery; some 29.0 per cent attained almost mastery and 17.0 per cent non-mastery. The percentage of students achieving mastery declined by 2.0 percentage points compared with the previous year. Of the students who achieved mastery, 56.7 per cent were females. Two Hundred and Thirty-six private schools with a sitting population of 4 006 students had 87.0 per cent mastery, 11.0 per cent almost mastery, and 2.0 per cent non-mastery. The percentage of the students achieving mastery was 83.0 per cent in 2012/13, of which 52.2 per cent was females.

Grade Six Achievement Test (GSAT)

The GSAT facilitates the placement and continued development of students at the secondary level. A total of 40 870 students registered for the examination with 96.5 per cent sitting. The mean percentage scores were Mathematics, 60 (61.0 in 2013); Language Arts, 62.0 (63.0 in 2013); Social Studies, 63.0 (62.0 in 2013); Science, 68.0 (63.0 in 2013); and Communication Task, 75.0 (75.0 in 2013). Girls outperformed boys in all five subject areas. Students in private schools had better results than their counterparts in the public school types (Figure 22C).

Alternative Secondary Transitional Education Programme (ASTEP)

Students who did not achieve mastery on the Grade Four Literacy Test (GFLT)¹³ were placed in a special programme, ASTEP, for two years. They benefit from a special literacy–

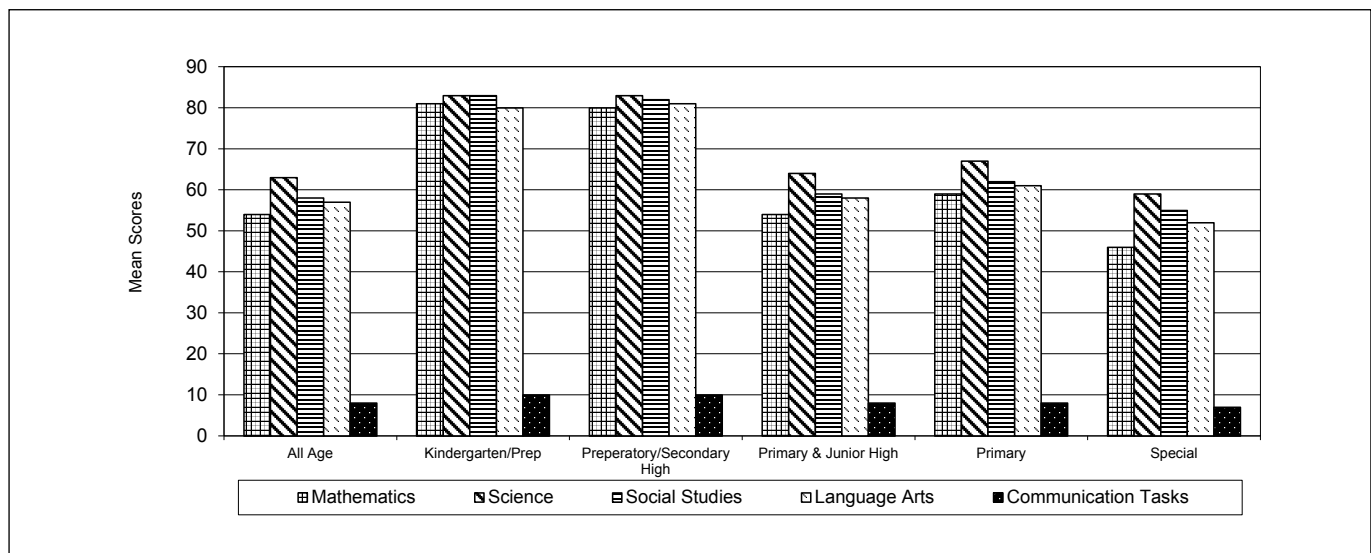


FIGURE 22C: PERFORMANCE IN GRADE SIX ACHIEVEMENT TEST BY SUBJECT AND SCHOOL TYPE, 2013/2014

12. The comparable data was 74.0 per cent in 2012/2013

13. As stipulated in the National Competence Based Transition Policy

TABLE 22.6
SECONDARY LEVEL STUDENT ENROLMENT BY SCHOOL TYPE, 2011/12–2013/14

	2011/12			2012/13			2013/14		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
All Age (Grades 7–11)	3 117	1 215	4 332	2 065	900	2 965	1 210	543	1 753
Junior High/Prim. & Junior High (GRADE 7–11)	8 057	4 889	12 946	6 654	4 255	10 909	5 700	3 821	9 521
Secondary High	93 856	105 129	198 985	93 995	102 705	196 700	94 201	102 650	196 851
Technical High	10 263	10 604	20 867	10 238	10 716	20 954	10 433	10 808	21 241
Vocational /Agricultural High	207	152	359	182	135	317	186	137	323
Sub Total	115 500	121 989	237 489	113 134	118 711	231 845	111 730	117 959	229 689
Private Secondary High a	6 930	7 319	14 249	3 960	4 155	8 115	3 128	3 303	6 431
TOTAL	122 430	129 308	251 738	117 094	122 866	239 960	114 858	121 262	236 120

a – Estimated Jamaica Survey of Living Conditions 2010 and 2012

Source: Statistics Section, Ministry of Education

based curriculum, and are then transitioned into the secondary system. In 2014, a total of 5 741 students (80.0 per cent males) were enrolled in the ASTEP, a 9.8 per cent increase compared with 2013. Approximately 592 students (81.0 per cent male) were accommodated in primary schools, 2 149 (80.2 per cent male) in All Age Schools and 3 000 (79.8 per cent male) in Primary and Junior High schools.

SECONDARY EDUCATION¹⁴

The total number of students enrolled in secondary institutions was 236 120, a 1.6 per cent decline compared with 2012/13 (Table 22.6). The continuing decline in enrolment at this level also mirrors the reduction in the size of this age group in the general population (see chapter on Population). Of this number, an estimated 6 431 students were enrolled in private secondary schools¹⁵. According to the *JSLC 2012*, the overall gross enrolment rate for Grades 7–11 was 97.3 per cent (97.3 per cent for both males and females)¹⁶. The Net Enrolment Rate was, however, 82.7 per cent¹⁷ (80.8 per cent males and 84.8 per cent females). Females accounted for 51.4 per cent of total student enrolment. The MoE data estimated that the average daily attendance at secondary level during 2013/14 was 82.7 per cent, (girls 84.3 per cent and boys 81.0 per cent).

There were 13 124 teachers employed in the 363 public schools offering secondary level education, compared with the 13 594 recorded in 2012/13 (see Table 22.5). Among these teachers, 54.8 per cent were trained university graduates, from 40.7 per cent in 2010, while 27.8 per cent were college trained teachers/instructors. The average pupil to teacher ratio was 19:1¹⁸. Females accounted for 70.1 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

In 2014, a total of 36 283 students were registered at the Grade 11 (55.6 per cent female) to sit the CSEC examinations and 35 488¹⁹ sat the examinations. Although Mathematics and English Language were compulsory for all students and were paid for by the Government, the data showed that 36.1 per cent of students enrolled in the Grade 11 cohort did not sit English Language, while 43.8 per cent did not sit Mathematics. The

14. 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).

15. Estimated using *JSLC 2012* data

16. The comparable gross enrolment rate from the MoE Statistics Unit was 93.1 per cent, (male, 89.7 per cent, female 96.5 per cent); however, the Net Enrolment Rate was 74.2 per cent (79.2 per cent females and 69.5 per cent males)

17. Net Enrolment in 2012, 74.2 per cent (80.6 per cent, female, 68.2 per cent, male)

18. Teachers on leave and administrators were excluded for the computation.

19. This represented 85.5 per cent of the 2013/14 Grade 11 cohort (41 515 students)

TABLE 22.7
PERFORMANCE OF PUBLIC SECONDARY SCHOOL STUDENTS
AT THE GENERAL AND TECHNICAL PROFICIENCY LEVELS, CARIBBEAN EXAMINATION COUNCIL, 2011–2014

SUBJECTS	Number of Persons Sitting				(Percentage) ^a			
	2011	2012	2013	2014	2011	2012	2013	2014
Arts/Language								
English A (English Language)	24 592	27 626	26 489	26 527	68.5	52.0	63.7	66.4
Social Studies	15 304	16 774	16 487	15 995	69.9	70.2	68.5	58.5
Caribbean History	5 124	5 688	5 357	5 023	77.3	73.9	75.2	69.4
English B (English Literature)	7 018	7 075	7 430	7 474	78.6	74.2	80.1	78.2
French	691	723	822	935	77.4	81.6	83.2	79.6
Spanish	3 663	3 896	3 839	3 802	74.2	72.3	76.1	70.7
Religious Education	2 990	3 223	2 820	2 761	84.9	82.0	75.6	75.2
Geography	4 112	4 377	4 298	4 385	67.7	67.1	72.1	68.0
Music	149	139	156	195	57.0	53.2	62.2	78.5
Sciences								
Additional Mathematics	n/a	306	572	930	n/a	45.1	66.6	73.2
Biology	5 327	5 598	5 510	5 805	78.4	75.4	77.1	78.3
Human & Social Biology	9 041	10 126	9 866	9 887	65.2	59.8	67.1	65.2
Chemistry	5 031	5 073	5 198	5 220	66.0	63.3	66.7	74.0
Physics	4 340	4 589	4 714	4 948	73.9	76.5	68.7	78.0
Integrated Science	6 766	7 344	6 992	6 555	69.5	72.6	74.1	71.9
Mathematics	20 850	23 729	22 870	23 351	39.9	37.5	42.2	55.5
Technical/Vocational								
Agricultural Science (Animal Science)	2 472	2 795	2 864	2 851	90.9	90.9	93.3	81.3
Agricultural Science (Double Award)	420	551	452	507	94.0	92.7	95.4	78.7
Visual Arts	1 700	2 090	1 905	1 912	65.8	66.5	76.9	71.3
Building Technology (Construction)	782	776	819	1 026	81.6	73.2	84.7	83.5
Building Technology (Woods)	928	1 116	978	1 109	68.0	57.1	78.6	69.1
Clothing & Textiles	1 354	1 428	1 625	1 576	79.1	85.9	73.2	81.3
Electrical & Electronic Technology	1 982	2 124	2 007	2 006	43.6	62.3	60.5	56.3
Elec Doc.Prep. & Mgmt.	4 355	4 646	4 539	5 023	82.7	88.5	84.0	86.8
Food & Nutrition	4 883	5 063	5 121	5 165	92.6	89.4	91.7	92.6
Home Management	3 516	3 759	3 769	3 800	88.8	84.0	84.6	90.2
Information Technology	10 515	11 204	11 160	11 536	75.1	80.5	79.2	77.6
Mech. Eng. Technology	1 078	1 229	1 347	1 297	54.1	65.1	73.9	67.8
Phys. Education & Sports	2 442	1 229	3 254	3 405	94.8	96.7	95.6	97.2
Technical Drawing	3 221	3 379	3 433	3 859	68.7	60.7	76.6	77.0
Theatre Arts	485	599	660	716	72.4	85.8	85.5	88.5
Business								
Office Procedures	4 556	4 686	4 226	4 357	88.8	80.3	84.2	79.5
Principles of Accounts	6 682	6 693	6 141	6 173	73.2	60.3	80.5	72.9
Principles of Business	8 312	8 864	8 458	8 738	84.9	87.1	85.8	82.5
Economics	722	914	902	963	78.8	67.6	89.7	78.0

a – expressed as a percentage of those sitting

n/a – not available

Source: Ministry of Education– Policy Analysis, Research and Statistics Unit

percentage pass rate for English Language was 66.4 per cent (63.7 per cent, 2013) and for Mathematics 55.5 per cent (42.2 per cent, 2013) (see Table 22.7).

Student Performance — of the 196 434 subject entries in the CSEC examinations, 71.3 per cent attained Grades I – III compared with 70.9 per cent in 2013. The analysis of

the data on performance by sex continued to show females receiving higher quality grades than their male counterparts²⁰. The Technical and Vocational subjects recorded the highest average pass rate, 83.2 per cent compared with 82.6 per cent in the previous academic year. Physical Education & Sports (97.2 per cent), Food and Nutrition (92.6 per cent), and Home Economics Management (90.2 per cent) recorded the highest

TABLE 22.8
JAMAICAN STUDENT PERFORMANCE IN THE CARIBBEAN EXAMINATION COUNCIL, GENERAL PROFICIENCY
CSEC EXAMINATIONS, ENGLISH LANGUAGE AND MATHEMATICS, BY SCHOOL TYPE, 2010–2014

	Mathematics					English Language				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Secondary High Schools										
Eligible Cohort	37 357	37 958	39 038	37 852	37 322	37 357	37 958	39 038	37 852	37 322
Entries	19 148	19 520	22 165	21 158	21 599	22 071	55 535	25 296	24 126	24 070
Sitting exam	18 510	19 039	21 580	20 712	21 159	21 647	22 126	24 817	23 785	23 705
Awards	8 631	7 885	8 383	9 111	11 985	15 774	15 529	13 344	15 464	15 955
Per cent of Sitting Awarded	46.6	41.4	38.8	44.0	56.6	72.9	70.2	53.8	65.0	67.3
Technical/Agricultural Schools										
Eligible Cohort	4 875	4 721	4 459	4 348	4 193	4 875	4 721	4 459	4 348	4 193
Entries	2 331	1 853	2 233	2 196	2 240	2 744	2 505	2 872	2 742	2 870
Sitting exam	2 232	1 811	2 149	2 158	2 192	2 677	2 466	2 809	2 704	2 822
Awards	640	433	507	548	978	1 440	1 322	1 022	1 406	1 658
Per cent of Sitting Awarded	28.7	23.9	23.6	25.4	44.6	53.8	53.6	36.4	52.0	58.8
All Schools										
Eligible Cohort	42 232	42 679	43 497	42 200	41 515	42 232	42 679	43 497	42 200	41 515
Entries	21 479	21 373	24 398	23 354	23 839	24 815	25 040	28 168	26 868	26 940
Sitting exam	20 742	20 850	23 729	22 870	23 351	24 324	24 592	27 626	26 489	26 527
Awards	9 271	8 318	8 890	9 659	12 963	17 214	16 851	14 366	16 870	17 613
Per cent of Sitting Awarded	44.7	39.9	37.5	42.2	55.5	70.8	68.5	52.0	63.7	66.4

Source: Policy Analysis, Research and Statistics Unit, Ministry of Education

proportion of passes. Electrical and Electronic Technology recorded the lowest proportion of passes, 56.3 per cent.

Performance in the four business-related subjects had an average 78.7 per cent pass rate compared with 84.0 per cent in 2013. Principles of Business had the highest pass rate, 82.5 per cent, followed by Office Procedures, 79.5 per cent. The average pass rate for the Arts and Language subject group was 67.0 per cent (69.5 per cent, 2013). The subjects with the highest performance in this group were French (79.6 per cent) and Music (78.5 per cent) (see Table 22.7).

The average pass rate for Sciences was 65.9 per cent, compared with 58.9 per cent in 2013. Biology, recorded the highest proportion of passes, 78.3 per cent, followed by Physics, 78.0 per cent. Performance in Mathematics (55.5 per cent) was the highest ever recorded.

Performance by School Type in Mathematics and English Language

There was an improvement in performance across all school types in these two subjects. Secondary High Schools however performed better than their counterparts in Technical/Agricultural High Schools. Students in the secondary high schools had a pass rate of 67.3 per cent for English Language and 56.6 per cent for Mathematics, compared with students

in Technical/Agricultural High Schools who had pass-rates of 58.8 per cent and 44.6 per cent, respectively, for these subjects²¹ (Table 22.8).

Qualification for Tertiary Level Institutions

The basic requirement for entry to tertiary institutions is five CSEC subjects including English Language and/or Mathematics in Grades I – III. Students gaining five or more subjects inclusive of English Language and Mathematics numbered 9 130 (7 181 in 2012/13). The total achieving five or more subjects including English Language but not Mathematics was 3 559 (3 662, in 2012/2013), and there were 993 with Mathematics but not English Language (408, in 2012/2013). Of the number of public secondary school candidates who sat the CSEC in June 2014, approximately 38.6 per cent obtained five or more subjects²². Based on these outcomes approximately 33.0 per cent of the Grade 11 cohort could qualify for tertiary level entry, depending on the requirements of specific institutions and programmes.

The analysis of this matriculation data by school (164 secondary schools) revealed that the top 10 performing schools had an average 96.3 per cent of those students obtaining five subjects or more while the 10 lowest performing schools had 1.3 per cent meeting this requirement.

21. The comparable data for 2013 in English A and Mathematics was 52.0 per cent and 25.4 per cent respectively.

22. The comparable data for 2013 showed that 11 251 or 31.9 per cent of candidates met the basic requirements for tertiary education.

The MoE has introduced several initiatives to improve performance of all schools, including the curricularization of the CSEC syllabi and the piloting of the curriculum in 46 schools; the introduction of reading diagnostic testing in Grades 7–9; and workshops for teachers and students in all subjects.

Caribbean Advanced Proficiency Examination (CAPE)

For June 2014, there was a total of 57 858 (36 622 females) subject entries for Jamaican candidates in Units I and II of the Caribbean Advanced Proficiency Examination (CAPE). There were 4 673 more entries in 2014 than the previous year. Most of the entries, 40 750, were for Unit I. Of the subject entries for Unit I, 94.6 per cent sat, while 96.0 per cent of Unit II sat. An overall average of 88.1 per cent pass rate was achieved for entries in both Units.

Some 89.2 per cent of public secondary school entrants received passing grades in Unit I while 94.5 per cent of the entries received passing grades in Unit II. Community colleges had 79.0 per cent and 90.0 per cent passing grades in Unit I & Unit II, respectively.

Performance of all Jamaican candidates revealed that Digital Media, French, Art and Design had the highest pass rate with 100.0 per cent, 98.5 per cent and 98.4 per cent respectively for Unit I. Pure Mathematics, Geometrical & Mechanical Engineering Drawing, and Electrical and Electronic Technology with pass rates of 60.2 per cent, 64.5 per cent, and 74.5 per cent, respectively, had the lowest pass rates. The subjects with the highest pass rates at Unit II were Food & Nutrition (98.8 per cent), Art and Design (98.7 per cent) and Management of Business (96.6 per cent) while the lowest were Applied Mathematics and Accounting with pass rates of 78.8 per cent and 78.1 per cent, respectively.

The TVET Rationalization Project

The TVET Rationalization Project is an initiative of the Ministry of Education. The purpose of the project is to:

- manage the funds allocated to building capacity to include tools and equipment for TVET laboratories and the training of TVET instructors in accordance with the intended activities for the mainstreaming of TVET within the secondary school system
- increase access to quality technical and vocational education and training
- ensure equity and relevance of TVET offerings within the secondary school system
- promote excellence by offering well-developed technical and vocational programmes to academically qualified students
- provide secondary school students with relevant and marketable competencies which can be utilized nationally and well as in their communities

- provide better articulation with programmes offered by the tertiary institutions.

Activities for the year included the refurbishing and maintenance of TVET laboratories and the maintenance of TVET Centres of Excellence in selected schools within established clusters. The following were major activities:

- assessments conducted and plans executed to have Science Laboratories at Sydney Pagon High School refurbished.
- training conducted with TVET Teachers (CAPE & Caribbean Vocational Qualification), STEM Principals, Mathematics and Science Teachers. A symposium was held for all teachers on Forum in Innovation and Teaching (FIT)
- TVET Quality Awards in Secondary Schools Programme and Ceremony was hosted and replaced the Teacher of the Year Awards.
- the draft TVET policy manuals were printed, packaged and dispatched to several high schools, libraries, teachers' colleges and universities.

The Career Advancement Programme (CAP)

CAP is a two-year programme with participants receiving skills training at the NVQ–J Levels 1 and 2. Students who do not have passes in English A and Mathematics at the CSEC level are required to sit the City & Guilds Mathematics and English examinations. Students were engaged in skills training in 42 National Vocational Qualifications of Jamaica across the Agriculture, Construction, Education, Health, Information and Communication Technology, Services and Tourism industries. There were 56 schools with 4 665 trainees/students enrolled on the programme for the 2014/2015 academic year. For 2013/14 FY the CAP was funded by the HEART Trust NTA, the Inter-American Development Bank (IDB) and the MOE.

Highlights for the period included:

- capacity building initiatives supported by the HEART Trust/NTA and City & Guild—to improve the quality of the teaching–learning exchange within CAP Centres with the aim of improving the certification and retention rates
- recruitment fair— held to attract and enrol prospective candidates for the 2014/15 academic year
- a Financial Review of all existing CAP Centres
- a Teaching Strategy Symposium for teachers within all CAP Centres.
- a National Lesson Plan Database—created to allow Teachers to access structured and rated lesson plans which support instructional strategies

- a Quality Register of Documents—implemented to guide students, school personnel and partners in programme delivery.

Safe Schools Programme

The Safe Schools Programme is the result of a partnership among the Ministry of Education, Ministry of National Security, Ministry of Health and the Jamaica Constabulary Force aimed at reducing crime and violence in the public schools. As at January 2015, there were 133 schools participating in the programme and 179 active School Resource Officers.

SPECIAL EDUCATION

Special education options are delivered to some 4 118 students (Table 22.9) in 27 institutions through:

- 1. Formal School-Based Programmes** – 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*
- *Schools for the Deaf, three in addition to four satellites*
- *Six schools for the Intellectually Disabled/Mentally Retarded in addition to 23 satellites*
- *Eighteen Government Special Education Units attached to primary schools.*

- 2. Non-Government Organizations/Community-Based Programmes**

These 18 organizations serve 2 200 children and received salary support of \$35.0 million from MoE's allocation. They provide educational, rehabilitation and therapeutic services for children with diverse disabling conditions. Due to inadequate

number of places in the public education system for students with special needs, the Ministry placed 48 additional students in selected private special education facilities. A total of 199 students were in private placement. Some 390 students were assessed in literacy and numeracy, with 8.0 per cent making three or more grade level movements; 8.0 per cent made two grade level movements; 23.0 per cent made one grade level movement, and 61.0 per cent moved within grade level.

A total of 7 628 students were screened in selected schools to determine possible psycho-educational challenges that negatively affect learning. Based on the findings of the screening, some students were referred for more intensive assessments to accurately determine their true status. A referral manual previously developed was revised and circulated.

Of the four diagnostic centres, one was established and the others were at different stages of completion. The Vouch Centre in Kingston was at an advanced stage of completion and has started some basic sensitization and screening activities. Steps were taken to establish centres at Sam Sharpe Teachers' College, Church Teachers' College, and the College of Agriculture, Science and Education.

UNICEF Quality Education Plan provided support for the development of a curriculum for children with moderate to profound intellectual disabilities. The consultants conducted nine days of curriculum development workshop activities with a wide range of stakeholders serving the needs of students with moderate to profound intellectual disabilities. A draft document with all five disciplines was prepared for pilot testing and 20 teachers trained to pilot test the document in six special education schools. The pilot will be completed in June 2015.

Other Major Developments:

- to address the needs of children suspected of, or diagnosed as having a special education needs, seven Regional Special Needs Coordinators were engaged to provide technical support and advice to

TABLE 22.9
ENROLMENT IN GOVERNMENT AND NON-GOVERNMENT SPECIAL EDUCATION PROGRAMMES, 2013/14

AREA OF FOCUS

	Male	Female	Total
Intellectually Challenged	992	576	1 568
Blind and Visually Impaired	105	63	168
Deaf and Hearing Impaired	217	192	409
Learning Disabled	263	90	353
Multiple Disabled	242	182	424
Physically Disabled	122	82	204
Autistic	154	42	196
Attention Deficit Hyperactivity Disorder (ADHD)	101	64	165
Speech and Language Disabled	212	109	321
Others	219	91	310
Total	2 627	1 491	4 118

Source: Special Education Unit, MOE

school administrators and teachers in mainstream primary schools

- twenty-two special educators were certified as trainers to commence training in Quality Education Circles islandwide. In addition, 119 teachers were trained in Applied Behaviour Analysis through Autism Pro and 91 educators are at an advanced stage of training as trainer of trainers in Team Teach, a positive behaviour management programme
- There were 154 assessments and recommendations for placement and treatment were made; 113 teachers were trained in using differentiated instructions in regular and special education settings
- 95 teachers' assistants, employed in six special schools were trained in Understanding Behaviour Issues of Children with Special Needs
- Some 299 teachers were sensitized in one-day gender-based workshops on Understanding and Teaching Boys effectively using Evidence Based Teaching Strategies to create Boy-Friendly Classrooms
- Some 79 teachers in special education and regular education schools were trained in the use of Life Space Crisis Intervention skills²³
- Some 72 literacy coaches trained in the management of classroom behaviour from the general and special education perspectives
- Some 42 participants received support in managing students suspected of having Attention Deficit Hyperactive Disorder
- A conference with 203 participants was held in observance of Disability Awareness Week under the theme: Understanding Childhood Health Impairments and Disabilities for Inclusion and Development
- 1 000 revised resource room manuals were published and distributed to schools to guide resource room programme interventions
- Nine persons recruited as teachers' aides under a Career Advancement Programme (CAP) initiative.

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 62 451 (54.4 per cent female) were trained in post-secondary institutions compared with 65 646 persons (61.0 per cent female) in 2012/13 (see Table 22.10).

HEART Trust/ National Training Agency

The primary goal of the National Training Agency is to address the country's labour market needs by providing technical and financial support to the TVET system, creating training opportunities that will equip the labour force with the skills necessary to ensure increased productivity and economic growth. During the financial year, HEART Trust/NTA continued to play a critical role in the training and certification of the Jamaican workforce, in so doing it launched two new Workforce Colleges, the HEART College of Construction Services (previously Portmore Academy) and the HEART College of Hospitality Services (previously known as Runaway Bay Academy). Two new TVET Institutes, the North West TVET Institute (Kenilworth, Granville, Cornwall Automotive Training Institute (CATI); Falmouth) and the Eastern TVET Institute (Stony Hill, Llundas Vale, Above Rocks) were also launched.

An evaluation of the previously established Southwest TVET Institute (a merger of Newport, Black River and Junction Vocational Training Centres into a single operation), was conducted to inform the development of the structure and operational standards for the establishment of the other two TVET institutes. The institutions have been clustered with a view to positively impact internal efficiencies while meeting the training needs for national development.

Enrolment and Certification

Enrolment: During FY 2013/14, the number of individuals accessing training through the HEART Trust/ NTA funded/ supported system was 71 794 (52.9 per cent females), a 5.6 per cent decline compared with FY 2012/13 (Table 22.11). Training was delivered in seven of the nine *Vision 2030 Jamaica* priority sectors. Of this number, only two skills areas, Agriculture, (15.9 per cent) and Services (8.6 per cent), recorded increases in enrolment over the last financial year 2012/13. The category Other, which represents skills that are

23. This approach to crisis management is a therapeutic strategy for using crisis events as opportunities to help children learn other ways of managing aggressive, disrespectful and self-demeaning behaviour.

TABLE 22.10
OUTPUT OF SKILLED AND SEMI-SKILLED MANPOWER BY OCCUPATION, 2011–2014

OCCUPATION	2011			2012			2013			2014		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
1. Agricultural Personnel	926	376	1 302	1 973	1 317	3 290	1 370	2 245	3 615	1 447	1 786	3 233
2. Cooks, Waiters & Other Hotel Personnel	2 446	8 100	10 546	2 375	6 172	8 547	3 383	13 091	16 474	5 024	9 996	15 020
3. Craftsmen, Production Process and Operating Personnel	7 728	1 199	8 927	7 034	1 499	8 533	7 296	2 675	9 971	5 774	3 920	9 694
4. Police	506	267	773	523	50	573	636	117	753	636	117	753
5. Secretarial and Other Commercial Personnel	2 624	5 991	8 615	2 854	5 655	8 509	5 192	8 720	13 912	8 999	7 864	16 863
6. Cosmetology	77	2 393	2 470	80	2 299	2 379	150	1 091	1 241	21	191	212
7. Computing	3 216	4 788	8 004	5 596	7 386	12 982	5 971	7 796	13 767	5 923	7 628	13 551
8. Miscellaneous a	1 941	5 972	7 913	2 037	3 453	5 490	1 296	4 617	5 913	653	2 472	3 125
TOTAL	19 464	29 086	48 550	22 472	27 831	50 303	25 294	40 352	65 646	28 477	33 974	62 451

a – Miscellaneous 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, Vocational/Agricultural Schools and Other Selected Training Institutions.

outside the *Vision 2030* priority sectors recorded the highest reduction in enrolment, moving from 11 061 in 2012/13 to 7 527 in 2013/14. This category represents skills which mainly pertain to educational and medical/allied health programmes.

The total number of HEART graduates declined by 34.9 per cent to 27 430 (51.0 per cent females). All Skill/Sectoral Areas recorded declines in completions over the previous year. The highest reductions were Manufacturing (66.6 per cent), Others (50.3 per cent), and Construction (42.0 per cent) (see Table 22.11).

Based on labour market demands, access to higher-level training (Level 3 and above), was a targeted priority area for expansion during FY 2013/14. Enrolment in NVQ–J higher level HEART Trust/NTA funded training programmes was 6 613, compared with 5 381 in 2012/13. In addition, some 4 024 students were enrolled in tertiary programmes, bringing the total higher level trainees to 10 637, an 11.0 increase compared with 2012/13.

Certification: A total of 27 430 individuals were awarded through NVQ–Js, Joint Certifications, Statements of Competence, and other programmes (Tertiary and Non–

TABLE 22.11
ENROLMENT AND OUTPUT OF SKILLED AND SEMI-SKILLED MANPOWER FROM NON-FORMAL HUMAN DEVELOPMENT AND RESOURCE TRAINING/ NATIONAL TRAINING AGENCY PROGRAMMES, 2012/13–2013/14

SKILL AREAS	ENROLMENT			OUTPUT			ENROLMENT			OUTPUT		
	2012–2013			2012–2013			2013–2014			2013–2014		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Agricultural Skills	551	480	1 031	253	233	486	714	481	1 195	239	139	378
Construction	10 423	767	11 190	5 244	505	5 749	9 660	754	10 414	3 099	233	3 332
Creative Industries	185	212	397	101	173	274	187	198	385	74	127	201
ICT	4 252	4 321	8 573	2 518	2 406	4 924	3 691	4 087	7 778	1 413	1 467	2 880
Manufacturing	841	1 051	1 892	513	783	1 296	605	881	1 486	180	253	433
Services	8 766	15 092	23 858	5 192	8 720	13 912	13 144	12 756	25 900	6 486	4 436	10 922
Tourism	4 723	13 339	18 062	2 278	7 297	9 575	4 361	12 748	17 109	1 345	4 998	6 343
Other(Non–Vision 2030 Sectors)	3 287	7 774	11 061	1 296	4 617	5 913	1 450	6 077	7 527	584	2 357	2 941
Grand Total	1 577	43 036	76 064	17 395	24 734	42 129	33 812	37 982	71 794	13 420	14 010	27 430

Note: Output for FY 2012–13 was based on the measurement ‘Completion’, which is the total number of Trainees exiting the system after fulfilling all training and assessment requirements for the duration of the programme, whether or not they are deemed competent for certification

Output for FY 2013–14 is based on the measurement ‘Certification’, which is the total number of Trainees who have successfully fulfilled all the programme or course requirements.

Source: Information Systems and Technical Services Division, HEART Trust/ NTA (2014)

NCTVET certificates). This is approximately 91.0 per cent of the annual target of 30 304 and an increase in actual certification by 4.0 per cent over last financial year 2012/13.

A total of 17 126 individuals received NVQ–J certification (Levels 1–5), while 1 817 individuals were certified in HEART Trust/NTA’s Tertiary programmes. Total NVQ–J and Tertiary certifications awarded for the financial year was 18 943, a decline of 1.0 per cent. A total of 2 740 Joint and Other certifications were issued, while an additional 5 747 Statements of Competence in units of programmes were awarded.

New Developments: the Organization also introduced a number of initiatives aimed at facilitating the development of the Logistic Hub. These included:

- collaboration with a number of major institutions in the maritime sector including the Caribbean Maritime Institute, Kingston Wharves, the Port Authority of Jamaica and the Shipping Association of Jamaica, for the development of a training plan to assess the manpower needs of the sector
- a study of the Maritime sector was conducted and the job required to support the operation of the Logistic Hub were identified and documented
- qualifications and competency standards were developed for jobs to be offered through the introduction of the Logistic Hub. Work has been done for the development of qualifications and competency standards.

Sector Studies completed

Sector Studies in Aviation, Manufacturing, Business Processing Outsourcing, Furniture Making and Agro Processing were completed. The findings of these studies were shared with stakeholders from the sectors and were also used to guide the development of curricula to support training interventions in the respective sectors.

A strategic initiative to improve the relevance of the training delivery system-wide was implemented. Consequently, a Programme Rationalization Report was completed and used to inform the alignment of training programmes to labour market needs. This initiative was supported by the Manpower Gap Analysis which was completed and the findings used to inform the Programme Rationalization Report.

Partnerships

Strategic partnerships established included:

- the purchasing of a building to facilitate the expansion of training opportunities in support of the establishment of the Logistic Hub
- Ministry of Transport, Works and Housing for repair of heavy duty vehicles and for the provision of higher

level training and certification of bus drivers and conductors. Some 4 500 bus drivers and conductors were certified

- Business Processing Industry Association of Jamaica for the development of training materials, as well as the training and certification of individuals to meet the manpower needs of the industry. Training in Call Contact Centre Level II programme was implemented in 13 institutions with 380 participants
- JAMPRO to facilitate the expansion of training opportunities in Digital Animation Level II programmes. Some 16 instructors completed courses in Animation Training at the Edna Manley College of the Visual and Performing Arts
- E-Learning Jamaica to support the implementation of the Tablet Project. Some 836 public school teachers were registered with NCTVET for Data Entry level I programme, with 530 certified

BOX 22.1 NEW CURRICULA/PROGRAMME DEVELOPED AND IMPLEMENTED BY HEART TRUST/NTA

Curricula/Programme outlines developed	New Programmes Implemented
Stevedoring Level 2 (Accelerated)	Apiculture NVQJ Level 2 Agriculture
Industrial Electronics Level 2	Bakery Chef NVQJ Level 1 Tourism
Industrial Electronics Level 3	Bursar NVQJ Level 2 Services
Motor Vehicle Engine Systems Level 1	Digital Animation NVQJ Level 1 & 2 Creative Industry
Music Business Operations Level 2	Mobile Application Development Certificate ICT
Apiculture Level 2	Motor Vehicle Diesel System Certificate Services
Digital Animation Level–2	Power Line Construction And Maintenance (Distribution)
Heavy Duty Vehicle Maintenance Level 2	NVQJ Level 2 Services
Interior Decorating Level 4	Renewable Energy NVQJ Level 4 Construction
Jewellery–Precious Metal Production –Level 2	Small Ruminant Rearing (Goat & Sheep) NVQJ Level 3 Agriculture
Instructional Videos developed include:	Solar–Photovoltaic Certificate Construction
Information Technology–Creating a Client Server Network	Supervisory Management Certificate Services
Information Technology–Initiating and Shutting Down Computer: Data Operations Level 1	
Hot Stone Massage: Massage Therapy Level 3	
Pressure Testing for a Cooling System (Motor Vehicle Repair Level 2)	

- the Ministry of Education to support and expedite the implementation of TVET in the formal school system and the development of the TVET Integration document
- Jamaica Productivity Centre for the establishment of a baseline for productivity level in the country
- Ministry of Industry, Investment and Commerce for the integration of Science, Technology, Engineering and Mathematics (STEM) in the development of instructional materials.

Training Material Development

A total of 30 pieces of instructional materials were developed and distributed for use by the training system during fiscal year 2013/14. These include both training videos and curricula/programme outlines which were widely deployed to the MoE for use in the formal system. Box 22.1 summarises the new curricula/programmes developed and implemented by HEART Trust/NTA.

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. Available data indicate that the output of tertiary institutions totalled 15 760 (Table 22.12). Enrolment at this level was estimated at 74 597 students (65.5 per cent female) and a gross enrolment rate of 28.9 per cent of the tertiary age cohort (20–24 years) (Table 22.13).

College of Agriculture, Science and Education (CASE)

The College of Agriculture, Science and Education is a multi-disciplinary institution, engaged in a wide range of programme offerings, from Diplomas to Bachelors Degrees. Notable developments for the period included:

Dairy Improvement/Upgrade which included a grant sum of \$5.0 million from The Dairy Development Board for improvement of the Dairy Unit at the College. Additionally, it facilitates herd expansion involving the Jamaica Hope breed of dairy cattle, for which CASE is a custodian. Work is currently underway to expand the piggery unit at a projected cost of \$3.0 million.

For the 2013/14 academic year the College embarked on new academic programmes, these included:

Post Graduate Diploma in Education, the Diploma in Secondary Education by Advanced Placement was replaced by the Postgraduate Diploma programme and is offered at

CASE main campus and two off-sites—Old Harbour, and Brown's Town.

Associate of Science Degree in Social Work, (through the Council of Community College in Jamaica) started in response to the market demand with a cohort of 15.

As a measure to combat praedial larceny challenges, the college developed a low cost monitoring system with the use of a computer system. This enabled monitoring of activities on the farm through a motion detector that wirelessly feed information from positioned camera lens.

Management Institute for National Development (MIND)

For the FY2013/14, MIND recorded an overall participant enrolment of 4 689 (74 per cent female) for both Scheduled and Customised training interventions with an overall 83.0 per cent completion rate (76.0 per cent female).

A number of Leadership Development Initiatives were introduced and the supporting documents developed to guide the institutionalization of a culture that embraces and leverages leadership. The Public Sector Leadership Development Framework (PSLDF) was developed, as a reference for how leadership should be cultivated in order to enable optimal results. The Caribbean Leadership Project (CLP), is a seven-year Canadian International Development Agency (CIDA) funded initiative to support leadership development in 12 participating CARICOM countries. The Project targeted 250 senior public sector executives, and it is envisaged that they should significantly influence the conversations and behaviours relating to leadership development in their respective organizations and countries. The CLP is managed by the Canada School of Public Service with support from the Cave Hill School of Business.

The University of the West Indies (UWI)

Enrolment and Graduation

Enrolment of Jamaicans at the three campuses of the UWI²⁴ remained relatively constant increasing by less than 1.0 per cent to 15 515 students (68.0 per cent female) (Table 22.14). Of this number, 72.6 per cent were enrolled full-time. At the Mona campus there were 15 156 Jamaican students (68.5 per cent female); at the St. Augustine campus 205 (52.2 per cent male); and on the Cave Hill campus 154 (74.0 per cent female). The number of Jamaicans enrolled in undergraduate programmes marginally increased by 1.0 per cent to 12 270. For higher degrees, enrolment declined by 1.3 per cent to 2 962. At this level, the Faculty of Social Sciences accounted for 35.3 per cent of those registered, followed by Humanities and Education (29.6 per cent) and

24. Enrolment of Jamaicans at Mona, Jamaica; St. Augustine, Trinidad; and Cave Hill in Barbados.

TABLE 22.12
OUTPUT OF PROFESSIONAL, SENIOR OFFICIALS AND TECHNICIANS, 2012–2014

OCCUPATION	2012			2013			2014		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Teachers	653	2 399	3 052	569	2 667	3 236	308	1 450	1 758
Vocational Instructors	579	828	1 407	476	815	1 291	361	590	951
Others	34	122	156	30	206	236	29	110	139
Medical Doctors	62	166	228	89	196	285	125	351	476
Nurses	26	714	740	14	833	847	8	450	458
Diagnostic									0
Radiographers (Prof. & Technicians)	5	17	22	15	12	27	6	12	18
Food & Nutrition (Prof. & Technicians)	0	0	0	11	56	67	15	45	60
Medical Technologists (Prof. & Technicians)	19	47	66	14	39	53	15	47	62
Laboratory Technicians	0	0	0	0	0	0	1	1	2
Pharmacists (Prof. & Technicians)	27	114	141	26	165	191	17	50	67
Physiotherapists	4	20	24	10	25	35			0
Dental Nurses/Assistants	1	28	29	8	58	66	7	49	56
Others	28	183	211	84	269	353	32	136	168
Accountants	487	1 278	1 765	51	142	193	174	581	755
Managers/ Administrators	923	2 402	3 325	978	3 573	4 551	1 225	3 598	4 823
Engineers	232	37	269	113	52	165	122	30	152
Engineering Technicians	12	5	17	64	6	70	66	7	73
Economists	30	39	69	33	47	80	24	35	59
Social Scientists	77	177	254	124	375	499	177	652	829
Others	188	511	699	100	505	605	208	501	709
Physicists	0	1	1	6	5	11	3	2	5
Chemists	22	39	61	32	36	68	25	51	76
Others	116	189	305	140	206	346	294	688	982
Architecture (Prof. & Technician)	18	23	41	19	17	36	23	16	39
Land Surveyors (Prof. & Technicians)	13	22	35	56	20	76	64	20	84
Planning and Construction (Prof. and Technicians)	50	96	146	116	43	159	438	65	503
Others	46	67	113	753	32	785	26	14	40
Attorneys	25	112	137	58	191	249	44	143	187
Law Professionals	49	116	165	4	10	14	0	0	0
Mathematicians	15	10	25	11	22	33	12	9	21
Agriculturalists	39	29	68	42	48	90	47	51	98
Computer Operator/Programmer	462	473	935	619	294	913	163	124	287
Computer Technician	13	6	19	133	37	170	250	330	580
Theologians	42	10	52	31	8	39	50	54	104
Engineers/Deck Officer	134	52	186	144	36	180	142	36	178
Miscellaneous Occupations	173	524	697	128	448	576	170	791	961
Total	4 604	10 856	15 460	5 101	11 494	16 595	4 671	11 089	15 760

Source: Compiled from data supplied by the University of the West Indies, University of Technology and other Tertiary Institutions.

Medicine (18.7 per cent). Enrolment in the Faculty of Social Sciences at the baccalaureate level continued to dominate total registration accounting for 37.3 per cent, followed by Science and Technology, which accounted for 20.7 per cent.

Total output of Jamaican students²⁵ from the UWI marginally increased to 3 092 (73.1 per cent female) from

3 081 in 2012/13 (74.4 per cent female). Undergraduate degrees accounted for 73.7 per cent, and higher degrees for 23.3 per cent, while certificates, diplomas, advanced diplomas and associate degrees together represented 3.0 per cent. The top three areas of study among undergraduates were:

25. Graduating students in all three campuses.

TABLE 22.13
ENROLMENT IN SELECTED TERTIARY INSTITUTIONS BY GENDER, 2013/14

Institution	Male	Female	Total
B & B University College	132	279	411
Bethel Bible College	90	74	164
Bethlehem Moravian College	70	471	541
Brown's Town Community College	380	796	1 176
Heart College for innovation and Technology	434	359	793
Heart College of Beauty Services	98	718	816
Heart College of Construction Services	1 247	93	1 340
Heart College of Hospitality Services	427	622	1 049
Caribbean Graduate School of Theology	12	26	38
Caribbean Maritime Institute	989	460	1 449
Catholic College of Mandeville	32	449	481
Church Teacher's College– Mandeville	162	704	866
College of Agriculture Science and Education	321	563	884
Edna Manley College of the Visual and Performing Arts	243	278	521
Excelsior Community College	606	1 264	1 870
G. C. Foster College of Physical Education & Sport	292	252	544
Hydel University College	4	29	33
International University of the Caribbean	636	2 058	2 694
Institute of Chartered Accountants	174	468	642
Jamaica Theological Seminary	65	45	110
Justice Training Institute	12	60	72
Knox Community College	373	598	971
Management Institute of National Development	1 197	3 492	4 689
Media Technology Institute	96	138	234
Mico University College	129	450	579
Moneague	221	983	1 204
Montego Bay Community College	605	1 290	1 895
National Academy	3	178	181
Northern Caribbean University	1 627	4 538	6 165
Nursing Schools	9	391	400
Portmore Community College	662	911	1 573
Sigma College of Nursing and Applied Sciences	1	67	68
Sam Sharpe Teacher's College	63	548	611
School of Medical Radiation Technology	29	54	83
Shortwood Teacher's College	50	630	680
St. Joseph's Teacher's College	25	490	515
United Theological College	6	3	9
University College of the Caribbean	966	2 527	3 493
University of Technology, Jamaica	5 508	7 642	13 150
University of the West Indies	4 923	10 593	15 515
Vocational Training Development Institute	1 284	1 373	2 657
Tertiary Migrant Students a	1 519	1 912	3 431
Total	25 722	48 876	74 597
2014 End of Year Population 20–24 Years (Tertiary Cohort)	130 252	127 509	257 761
Tertiary Gross Enrolment Rate	19.7	38.3	28.9

a– Calculated by the PIOJ from migration data from United States of America, Canada and the United Kingdom

Source: Tertiary Institutions and the MOE Statistics Unit

- MBBS in Medicine and Surgery, 277 persons
- BSc in Management Studies (Accounting), 153 persons
- Bachelors in Education, 137 persons.

At the higher degree level, the highest representation came from the MBA in General Management, 60 persons, and the MEd in Education Administration, 38 persons.

New Academic Programmes

Continuing in its thrust to align its offerings with market demand The UWI developed the following programmes:

- ***Faculty of Humanities and Education*** – Bachelors of Fine Arts Animation, and Film Production
- ***Law Faculty*** – European Union Law and International Human Rights Law
- ***The Faculty of Medical Sciences*** – MBA–MPH, Health Management; MPH, Gerontology; Postgraduate Diploma, Gerontology; DM, Plastic Surgery; MSc, Speech and Language Pathology, Doctor of Dental Surgery (DDS)
- ***The Sir Arthur Lewis Institute of Social and Economic Studies*** – MSc Development Studies
- ***Mona School of Business and Management (MSBM) and School of Education*** – Principals’ Professional Qualifications Programme (Aspiring Principals’ Programme)
- ***Faculty of Social Sciences – BSc – Economics of Sports; Diploma, Social Protection***
- ***Mona School of Engineering*** – BSc, Civil Engineering and Computer Systems Engineering

The Mona Campus, through the School of Education (SOE) and Joint Board of Teacher Education (JBTE), embraced the initiative of the Ministry of Education and Office of the Vice Chancellor to begin awarding UWI Bachelor of Education (B.Ed.) degrees for programmes at Jamaica’s teachers’ colleges. The SOE and JBTE are now providing quality assurance for the relevant courses and programmes.

External Research Funding

The Mona Campus received \$442.0 million in new external funding for 43 research projects, a 55.6 per cent

increase over the previous year. The areas of research that received the greatest portion of funding were:

- autism in Jamaica
- mental health, focusing on countering youth and urban violence in Kingston
- the prevalence and burden of chronic obstructive pulmonary disease in Jamaica
- bio–safety and strengthening viral diagnosis in Jamaica
- energy efficiency and renewable energy
- special education schools technology
- corporate renewal and transformation in the Caribbean region.

The UWI signed a contract with a US–based company for commercial production of its Cardiac Surgery Simulator. The simulator uses a pig’s heart to mimic behaviour of the human heart during cardiac surgery training. In collaboration with TBA21–Academy²⁶, the UWI, Mona Campus launched the Alligator Head Marine Lab (AHML) in Portland. AHML with support from the Portland Environment Protection Association (PEPA) will seek revitalise its reefs and protect underwater life forms.

The University signed a contract valued €1.1 million with the European Union (EU) and GoJ, through the Planning Institute of Jamaica (PIOJ). The funds will allow the Faculty of Medical Sciences to provide graduate medical and nursing training for the Programme of Reduction of Maternal and Child Mortality (PROMAC). The grant will also assist in infrastructural development and purchasing equipment.

An EDULINK grant valued €499 000 provided for the Promotion of Capacity and Energy Education Development in the Caribbean Region (PROCEED–Caribbean) project. PROCEED–Caribbean is a multi–institutional collaboration involving the UWI’s Mona and Cave Hill campuses, UTech, the University of Turku and Tampere University of Technology (both in Finland) and the Universidad de Oriente, Cuba.

Development projects for the period included renovation and expansion of existing facilities and the construction of new buildings. The institution recently entered into a concession agreement with K Limited, to create 1 584 student accommodation units, to be built in three phases. In

26. Thyssen–Bornemisza Art Contemporary (TBA21) represents the fourth generation of the Austrian Thyssen family’s commitment to the arts. The foundation is dedicated primarily to the commissioning and dissemination of ambitious, experimental, and unconventional projects that defy traditional categorizations.

TABLE 22.14
ENROLMENT BY FACULTY AND GENDER, UWI, 2012/13–2013/14

	2012/2013			2013/2014		
	Male	Female	Total	Male	Female	Total
First Degree						
Humanities and Education						
Humanities	407	1 078	1 485	381	1 040	1 421
Education	67	431	498	64	362	426
Total	474	1 509	1 983	445	1 402	1 847
Agriculture	1	4	5	2	5	7
Law	160	471	631	159	453	612
Engineering	26	7	33	28	8	36
Medical Sciences	469	1 857	2 326	543	1 993	2 536
Science and Technology	1 159	1 268	2 427	1 171	1 305	2 476
Social Sciences	1 482	3 122	4 604	1 522	3 055	4 577
Gender & Development Studies	49	128	177	48	131	179
Sub–Total	3 820	8 366	12 186	3 918	8 352	12 270
Certificate						
Humanities and Education						
Humanities	3	0	3	0	0	0
Education			0	0	1	1
Sub–Total	3	0	3	0	1	1
Agriculture	1	4	5	1	0	1
Medical Sciences			0			0
Social Sciences	0	1	1			0
Sub–Total	1	5	6	1	0	1
Diplomas						
Humanities and Education						0
Humanities	3	6	9	0	1	1
Education			0			0
Centre for Development for Gender Studies			0			0
Agriculture				0	1	1
Social Sciences	8	22	30	5	17	22
Sub–Total	11	28	39	5	19	24
Advanced Diplomas						
Humanities and Education						0
Humanities	1	0	1			0
Education			0	16	41	57
Medical Sciences	0	8	8	0	6	6
Engineering			0			0
Science and Technology			0			0
Social Sciences	9	16	25	8	13	21
Law			0			0
Sub–Total	10	24	34	24	60	84
Associate Degree						
Medical Sciences	1	18	19	1	15	16
Sub–Total	1	18	19	1	15	16
Higher Degree						
Humanities and Education	200	746	946	210	667	877
Engineering	39	11	50	31	8	39
Agriculture	10	1	11	7	3	10
Science and Technology	176	188	364	196	203	399
Law	2	5	7	2	3	5
Medical Sciences	141	383	524	143	412	555
Social Sciences	335	734	1 069	333	714	1 047
Centre for Development for Gender Studies	4	26	30	3	27	30
Graduate Studies	1	0	1			
Sub–Total	908	2 094	3 002	925	2 037	2 962
Special Admittance	36	107	143	49	108	157
TOTAL	4 790	10 642	15 432	4 923	10 592	15 515

Note: Special Admittance Diploma–84 students were given special admittance to various faculties

Source: University of the West Indies

May 2014 the UWI, Mona signed a partnership agreement to develop a new campus in Montego Bay, St James.

The University of Technology (UTech) Jamaica

Enrolment at UTech was at 13 150 students (58.1 per cent female) compared with 13 034 (58.8 per cent female) in 2012/13. The total number of graduates was 2 166 (62.6 per cent female) a decline of 7.7 per cent compared with the previous academic year (Table 22.15). The College of Business and Management and the Faculty of Engineering and Computing accounted for 56.8 per cent of total enrolment and 49.2 per cent of output, respectively.

During the review period, the achievements included:

- diversification and expansion of undergraduate courses of study in new disciplines including the Bachelor of Science Degree in Entrepreneurship; Post-Diploma Bachelor of Pharmacy; Pharmacy Technicians Certificate; and Bachelor of Arts in Communication Arts and Technology
- launch of the School of Humanities and Social Sciences in the Faculty of Education and Liberal Studies
- establishment of the Brian Silvera Refrigeration and Air Conditioning Laboratory in the School of Engineering, Faculty of Engineering and Computing

- the Civil Engineering and Information Systems Management programmes presented its first cohort of 26 graduates

Curriculum Development

Eleven existing courses of study were redesigned in keeping with internal and external (labour market) demands. Six of the revised courses of study included: Bachelor of Laws (LL.B), Bachelor of Business Administration, BSc Child and Adolescent Development, BSc in Critical Care Nursing, Dialysis Technicians Certificate (Part-Time), and B.Sc. in Pharmaceutical Technology. Graduate courses of study were developed in Engineering, Mathematics Teaching (MPhil), Workforce Training and Education, Dental Therapy, Nurse Anesthesia, Science in Trauma Studies, and Integrative Counselling. There was also Doctor of Philosophy in Educational Leadership and Management.

Distance Learning

- To date, UTech has graduated over 95 online students from an associate degree and three certificate courses, and extended its online footprint to 10 Caribbean countries. In September 2013, the College of Health Sciences commenced its first online course of study, the Post Diploma in Pharmacy, with 45 students from the Caribbean.

TABLE 22.15
ENROLMENT & GRADUATION AT UNIVERSITY OF TECHNOLOGY, JAMAICA
BY SCHOOL/DEPARTMENT, 2011/12–2013/14

Faculties	No. Enrolled 2011–2012			No. Graduated 2011–2012			No. Enrolled 2012–2013			No. Graduated 2012–2013			No. Enrolled 2013–2014			No. Graduated 2013–2014		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
College of Health Sciences	346	1 627	1 973	74	366	440	213	1 334	1 541	27	304	331	225	1 357	1 582	228	31	259
Faculty of Education and Liberal Studies	397	772	1 169	64	189	253	409	747	1 156	77	137	214	400	771	1 171	162	58	220
Faculty of the Built Environment	764	307	1 071	160	82	242	763	295	1 058	174	85	259	748	277	1 025	78	168	246
College of Business and Management	1 643	3 742	5 385	276	744	1 020	1 580	3 606	5 182	223	657	880	1 550	3 536	5 086	531	165	696
Faculty of Engineering and Computing	1 875	458	2 333	315	105	420	1 847	423	2 270	266	94	360	1 965	419	2 384	83	287	370
Faculty of Law	189	443	632	47	112	159	168	433	601	25	78	103	168	392	560	75	34	109
Faculty of Science and Sport	181	267	448	6	7	13	260	359	619	8	23	31	299	433	732	53	31	84
College of Oral and Public Health Sciences							126	471	597	24	144	168	153	457	610	145	37	182
GRAND TOTAL	5 395	7 616	13 011	942	1 605	2 547	5 366	7 668	13 034	824	1 522	2 346	5 508	7 642	13 150	1 355	811	2 166

Source : University of Technology , Jamaica

Disabilities Studies

The Child and Adolescent Development (ChAD) course of study initiated a Minor in Disabilities Study in January 2014. A unique element of this course is that it is taught by persons with disabilities. Students are required to spend time at the Shelly–Ann Fraser Assessment Centre where they observe trained care givers. Additionally, they are permitted to administer supervised care.

Collaborative Research & Partnerships

UTech is involved with six EU co–financed projects which include associates from Spain, Sweden, Switzerland, UK, Dominican Republic, Cuba, Suriname, Belgium, Finland, Germany, Denmark, Austria, Barbados, Jamaica and Trinidad & Tobago. Partnership included:

- UTech and the National Environment and Planning Agency (NEPA) – a MoU that will facilitate “cooperation and the sharing of information regarding natural resource management and spatial planning”
- Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)/Renewable Energy and Energy Efficiency Technical Assistances (REETA) – a Memorandum of Understanding (MoU). The MoU details commitments for training workshops/seminars to be undertaken towards building capacity to support the delivery of a Master Degree programme in Sustainable Energy and Climate Change. GIZ will finance curriculum development for the degree in areas that are either limited or not offered at UTech, and cover the cost of equipment/technology and software to establish an innovation lab at UTech.
- partnership was established among UTech’s College of Health Sciences, the Jamaica Promotions Corporation (JAMPRO) and the Ministry of Science, Technology & Mining (MSTEM) for placement of graduates for Pharmaceutical Technology course of study.
- partnership between UTech and the Jamaica Public Service Limited (JPS) resulted in the installation and commissioning of a Bulk Solar Plant. Twenty–one students who helped to build the plant were trained in photovoltaic and panel installation with one graduate securing a job in the industry. The UTech’s Faculty of Engineering & Computing (FENC) collaborated with Jamaica College to establish a Green House Project at the school.

Private Tertiary Institutions

Northern Caribbean University (NCU)

Enrolment of Jamaicans for all programmes at the NCU increased by 19.5 per cent to 6165 (73.6 per cent female). Students enrolled in the College of Business and Hospitality Management (26.0 per cent) had the largest share of total

enrolment followed by College of Humanities, Behavioural and Social Sciences (24.6 per cent) and College of Allied Health and Nursing (19.8 per cent). A total of 849 (79.0 per cent female) students graduated with the highest number in Nursing, 128; Business Administration, 107; and Education, 99.

The Master of Arts (MA) and Philosophy of Science degree (PhD) programmes were amended to incorporate more practical research methods and design on the curriculum. The Certificate in Special Education was offered by the Teacher Education Department (TED) as an additional matriculation requirement for all students in the department. The university commenced its first MA in Education evening cohort at the Willowdene Group of Schools in St. Catherine.

The NCU, now a training centre for the American Heart Association, expanded offerings in the health disciplines to include Cardiovascular Technician; Naturopathic Medical Exploration and Medical Technician support for national needs in partnership with Loma Linda University (USA)

The University introduced the Mathematics Institute which focused on improving the effectiveness of mathematics teachers with the aim to assist students in improving their performance in mathematics at all levels of the educational system. Distance Education and utilization of technology to enhance the teaching process continued with 63 undergraduate and 16 graduate courses being offered using online delivery modality. The University also completed a major study entitled, *War on Poverty Research: A Multi–disciplinary Approach*.

B & B University College

The B&B University College continues to offer undergraduate and graduate programmes primarily in business and construction project management. For the 2013/14 academic year enrolment was 416 (69.1 per cent females) while there were 117 graduates (70.1 per cent females).

International University of the Caribbean (IUC)

The University functions through two constituent colleges—College for Leadership and Theological Development (CLTD), formerly the Institute for Theological and Leadership Development (ITLD), founded in 1989, and the Mel Nathan College (MNC) founded in 2004. A total of 2 694 students were enrolled for the academic year 2013/2014. Some 608 students graduated. Through a partnership with the MoE and the HEART Trust/NTA, IUC offers the Career Advancement Programme (CAP) at NCTVET levels 1 and 2 in Commis Chef, Food and Beverage Services, Hospitality, Media Techniques, Electrical Installation, Construction Drafting, Computer Repairs, Data Operations and Technical Business Administration.

University College of the Caribbean (UCC)

The UCC offered professional training in business–related courses including Management Studies, Business

Administration, Management Information Systems, Tourism & Hospitality Management, and Human Resource Management. A new Bachelors in Social Work was introduced in 2013/14. The flagship BSc programmes in Business Administration, Human Resource Management and Information Technology accounted for 75.9 per cent of total enrolment. The total number of students enrolled was 3493 (72.3 per cent females) and 622 (76.3 per cent females) graduated.

SECTION 6: REGULATORY

Jamaica Tertiary Education Commission (J-TEC)

J-TEC continued with plans to draft legislation to govern the operations of the Commission. The legislation will provide the legal authority to undertake its mandate as the body to supervise, provide oversight and sustain the positioning of the tertiary sector to fulfil its role in national development. The J-TEC held a series of public education fora to sensitise all institutions and the general public to the future requirements of compulsory registration of tertiary institutions. For institutions currently registered with the University Council of Jamaica (UCJ), their registration will be ‘grandfathered’ but they will also be subjected to institutional scrutiny through J-TEC. J-TEC played an active role in the discussions on the rationalisation of quality assurance mechanisms at this level, as outlined in a Cabinet’s decision that there should be a sole entity for registration (J-TEC) and a sole entity for accreditation (UCJ) of tertiary institutions which is being coordinated through the work of Educational System Transformation Programme (ESTP) at the MoE.

J-TEC also 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 titled, *Cost, Eligibility and Participation in Jamaica’s Tertiary Education*, which will provide baseline data on, inter alia, motivators or de-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. The Commission began consultations with institutions and the World Bank about the transformation of delivery modalities in the tertiary sector.

J-TEC began to lead a process towards establishing a National Qualifications Framework for Jamaica, driven by a working group drawn from different categories of institutional stakeholders. The plan is to integrate the frameworks which currently exist for HEART/NTA and the UCJ with similar documents from CARICOM, Asia and Pacific countries, and the European Union, and to create a compatible framework with that of regional and international partners. Through the NQF, J-TEC will register all qualifications available in the education and training system.

J-TEC played a facilitatory role in negotiating the appropriate mechanisms for meeting the policy decision that the bachelor of education should be the minimum entry

requirement for the teaching profession. Grant funding was procured and a consultant engaged with support from the Inter-American Development Bank (IDB) for undertaking a needs analysis for building infrastructural capacity of the colleges.

University Council of Jamaica (UCJ)

The UCJ is the External Quality Assurance (EQA) Agency for tertiary education in Jamaica, ensuring that certain minimum standards are met at institutions offering tertiary education, and providing accreditation for degree and specialized programmes. It also functions as an awards and academic development body for tertiary institutions and programmes in Jamaica. In March 2014, the UCJ launched the Standards for Distance Education which aligned with international standards, will serve to guide institutions wishing to develop new programmes or improve existing programmes being delivered at a distance.

Accreditation

During the year under review, the UCJ 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:

- professional advice and services for the development and improvement of institutions and programmes of study
- training opportunities for staff at institutions with respect to the required standards
- appropriate public information about the institutions registered and programmes accredited by the Council
- assurance of the quality of programmes being offered in Jamaica by foreign institutions.

Certificates of Accreditation were presented to 12 tertiary institutions for 37 programmes that were accredited/reaccredited. Three short courses were also reaccredited. Eighteen accreditation and accreditation-related visits were conducted for a total of 57 programmes of study and one programme was granted recognition. In addition to the recognition of institutional accreditation granted to The University of the West Indies, the UWI Open Campus was granted institutional accreditation by the Barbados Accreditation Council. The UCJ evaluated three institutions for registration—one each as a tertiary institution, as a university college and as a university. In each case the process is ongoing and will continue in the next reporting period.

Seventeen proposals for four-year Bachelor of Education programmes were submitted by the Teachers’ Colleges to be evaluated for UCJ-approved Degree status. Evaluation reports were prepared for review and further action by the

Teachers' Colleges. Twenty-seven programmes were granted accreditation/re-accreditation. They comprised six Master degrees, 11 Bachelors degrees, eight Associate degrees, and two Postgraduate diplomas. Of the 27 programmes accredited, 18 were reaccredited and nine programmes were accredited for the first time. In addition six programmes were granted an extension of accreditation.

As at March 31, 2014, the total number of accredited programmes and UCJ-Approved degrees was 255. Of that number, 27 programmes were being offered in Jamaica by overseas institutions and nine were short courses. However, it should be noted, that 45 accredited/UCJ-Approved programmes were no longer being offered. They consist of 31 accredited programmes, 11 of which were offered in Jamaica by overseas institutions and 14 UCJ-Approved degrees. The total number of registered institutions, as at March 31, 2014, was 43.

For the period under review a total of 459 applications for the evaluation of credentials and verification were received. These included high school diplomas, undergraduate and graduate degrees, and professional certification originating from countries such as, United Kingdom, USA, Nigeria, India, Russia, Cuba, Congo, Columbia, and Venezuela. In addition, the UCJ processed over 1 500 queries received via telephone calls, e-mail, and walk-in customers.

The Council of Community Colleges of Jamaica (CCCJ)

The CCCJ supervises and coordinates the work of five Community and three Multidisciplinary Colleges with 19 satellites/campuses islandwide. In pursuance of its objectives, the CCCJ performs three main functions:

- Regulatory—develops and implements common standards, prescribes the conditions under which applicants may be admitted as students, and is the certification body for the all awards
- Promotional—promotes the interest of community colleges
- Developmental—responsible for providing professional development opportunities for members of staff of the colleges, collaborate with other institutions of higher learning in the delivery of programmes and the solicitation of grants, donations, prizes and gifts on behalf of the community colleges.

The Secretariat conducted a comprehensive review of the Hospitality and Tourism Management and Social Work Degree Programmes. The review process was guided by input from the UCJ, employers, graduates, faculty delivering the course content and the dynamics of the labour market. The expected outcome of the review process was that graduates will be provided with the skills, knowledge and competencies required by the labour market.

The CCCJ Secretariat has signed a Memorandum of Understanding (MOU) with Springer E-books to provide community college students with access to online library resources. A training session was conducted for librarians within the network of community colleges. The CCCJ, Secretariat also collaborated with Educo International to implement the e-learning portal for the teaching and learning of Mathematics in all the community college. Twenty-five lecturers were trained in the hybrid mode of delivery; and were expected to utilize their skills in the newly developed Foundation Concepts in Mathematics III course.

In collaboration with the CARICOM-Canadian Education for Employment (CEFE) and College and Institutes Canada, the CCCJ launched the Associate Degree in Logistics Management and Operations. The following programmes were developed:

- **Certificates** – Criminal Justice, Logistics Management
- **Associate Degrees** – Digital Forensics, Applied Computer Science, and Information Systems
- **Bachelor Degrees** – Applied Computer Science, Information System, Information Technology

The CCCJ hosted the ComCol Innovative Software Development Competition for students of the Community College system in Jamaica.

For the period 1 667 students were awarded degrees; 466 at the Bachelor's Degree Level and 1 201 at the Associate Degree level.

SECTION 7: IN-SERVICE TRAINING

Information received from 10 major private/public sector companies revealed that 8057 persons (68.4 per cent female) received training in areas such as Management and Administration, Computing, Banking, Financial Management and Accounting, Customer Relations and Supervisory Management. The companies' average allocation for training as a percentage of their overall budget was less than 1.0 per cent.

OUTLOOK

The focus continues to be the qualitative improvement in education, as the MoE continues to implement its National Education Strategic Plan. To this end, the work of the MoE will focus on producing a high quality education product to all Jamaicans 3–18 years, which will equip them to become productive contributing citizens. Five strategic objectives are to be targeted for 2020—85.0 per cent mastery in Mathematics at the Grade four level; 50.0 per cent of unattached youth accessing education and training; 90.0 per cent of secondary graduates accessing further education and training; an increase in the tertiary cohort to 50.0 per cent; and 90.0 per cent of the adult population literate.

Further plans for 2015/16 include HEART Trust/NTA facilitating a national youth programme, using a multi-agency

approach to train and equip young people with relevant skills for employment, decent work and entrepreneurship. Priority will be given to underserved youth including persons with disabilities. HEART/NTA will also ramp up its training of individuals in a combination of higher level technical skills, equipping them for employment in sectors such as Animation, Maritime, Transportation, Gaming, Alternative Energy and Business Process Outsourcing.

The Medium Term Socio-Economic Policy Framework (MTF, 2015–2018), a 3-year package of priority strategies and actions to facilitate achievement of the 21-year plan that comprises Vision 2030 Jamaica, will be implemented. The

national consultations are expected to determine the education and training sector policies and actions for implementation and their effective alignment within Ministries, Departments and Agencies.

The MOE will continue to participate in the formulation of the Post 2015 Development Agenda. The goal and target so far proposed for education are: Goal 4: Provide inclusive and equitable quality education and life-long learning opportunities for all; and Target 4.1 – by 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes. ■

HEALTH

INTRODUCTION

The Ministry of Health (MOH) and its partners, in providing access to quality health services, especially to the most vulnerable, ensured that health service delivery was included in the framework of sustainable development. As the year progressed, consultations continued with the International Development Partners (IDPs) on priority services in health emergencies, programmes for primary care renewal and strengthening of secondary care. The Ministry's Strategic Business and Operational Plans, and Service Level Agreements with the Regional Health Authorities (RHAs) were grounded in *Vision 2030 Jamaica — National Development Plan* as well as the Medium Term Socio-Economic Policy Framework (MTF) 2012-2015. The international commitments with respect to health included: the Millennium Development Goals (MDGs); Caribbean Cooperation in Health; UN Declaration on preventing premature deaths from Non-Communicable Diseases (NCDs); International Health Regulations (IHR) (2005); and the UN Convention on the Rights of Persons with Disabilities.

The MOH and its RHAs, however, faced many challenges as they navigated through the main strategies in achieving the health priorities in the Extended Fund Facility (EFF) with the International Monetary Fund (IMF). The tight fiscal constraints adversely affected the implementation of Service Level Agreements at the regional level. Areas affected included growing liabilities for pharmaceuticals and some contracted services; staff employment and remuneration; and public health programmes including immunization and vector control.

Service delivery was affected by the varying health demands of the population, increased use of public health facilities and health emergencies. The Chikungunya Virus (Chik V) outbreak and Ebola preparedness placed a burden on the health facilities and increased spending in public health for vector control, public education campaigns, and training of health professionals. Combating Chik V demanded multi-stakeholder involvement with Mayors, local government authorities, ministries with responsibility for Transport and

Works; Tourism; Water, Land, Environment and Climate Change; the National Solid Waste Management Authority; the National Water Commission; and others in national clean-up efforts. This was compounded by the impending threat of the Ebola Virus Disease that greatly impacted West African countries, but was a potential threat for the Caribbean mainly due to international travel patterns. The Health sector also expended many efforts in preparing public facilities to manage the condition should an incident occur.

In a bid to facilitate universal health coverage, the implementation of the No-User Fees Policy continued. This was further enhanced through the issuing of the Government of Jamaica (GOJ) Health Card to thousands of Jamaicans who tendered their applications for use at public health facilities thereby creating a trajectory for easier access to registration, better patient management and service utilization. This initiative is regarded as a positive step towards sustainable health financing.

Despite the challenges, there were many achievements some of which included: continued implementation of the integration of Family Planning and HIV services; continued progress in the implementation of projects; several infrastructural improvement in primary and secondary care facilities; improved access to care through additional health centres; and several policy shifts in procedure and practice, particularly in the areas of adolescent health, family planning, maternal and child health, and communicable diseases.

GLOBAL HEALTH AGENDA

Key global health issues highlighted at the 2014 World Health Assembly (WHA), included efforts to prevent and control NCDs, protecting more people from vaccine-preventable illnesses, progress toward the achievement of the MDGs (4, 5, 6)¹, and the role of health in the Post-2015 Development Agenda². In addressing these health issues, Jamaica reported on the achievements and failures of the health-related MDGs and outlined the mechanism to frame the national position on the health priorities in the Post-2015 Development Agenda (see chapter on Population). According to the 2014 assessment of Jamaica's progress towards the

1. MDG 4 reduce maternal mortality, MDG 5, Reduce infant mortality, MDG 6 Health the spread of HIV.

2. <http://www.who.int/mediacentre/news/releases/2014/world-health-assembly/en/>.

MDGs³, the country was on track to meet some important targets relating to HIV (MDG 6) but was lagging behind in the areas of maternal and infant mortality (MDGs 4 and 5). Health-related achievements included:

- MDGs 4 and 5 – there was success in indicators relating to universal access to reproductive health which was reflected in a decline in fertility levels—reaching the lowest of 2.4 women in 2008. The majority, 99.0 per cent of women received antenatal care and almost all women were attended to by a skilled birth attendant⁴. Using the MOH surveillance data, the maternal mortality rate consistently registered 93.7/100 000 live births between 2008 and 2010, which was 21.0 per cent below the 1990 base year levels. Since 2009, there was an overall decline by 25.0 per cent in child mortality. The percentage reduction for MDG 4 has not met the targetted two-thirds and MDG 5 is still below the targeted reduction of 75.0 per cent by 2015. These targets will not be met, however, there are accelerated programmes designed to fast tract their achievement.
- MDG 6 – there was a reduction in the prevalence of HIV/AIDS from 1.9 per cent in 2007 to 1.7 per cent in 2010. Approximately 84.0 per cent of pregnant women with HIV/AIDS were on antiretroviral treatment (ARV) in 2011 and an estimated 32 000 Jamaicans were living with HIV/AIDS in 2014.

Successes and gaps identified over the MDGs period informed the discussions and consultations for the Sustainable Development Goals of the Post-2015 Development Agenda. The unmet targets of MDGs 4 and 5, and aspects of MDG 6 were considered relevant to achieving a healthy and stable population, and were supported in Jamaica's Post-2015

National Outcome Document (NOD). Other health concerns included in the NOD were universal health coverage, communicable and non-communicable diseases, sexual and reproductive health, substance abuse, alcohol use, and malnutrition.

The WHA approved the monitoring framework for maternal and child nutrition. Ministers with responsibility for agriculture, health and foreign affairs and trade are expected to adopt a global policy framework for the next decade to address the major nutrition challenges of under-nutrition, micronutrient deficiencies, obesity and NCDs resulting from an unbalanced diet. Alignment of a national response was realised through the formulation of the National Food and Nutrition Strategic Plan, the School Feeding Policy, and the recent, National Infant and Young Child Feeding Policy.

FINANCING

The Total Health Expenditure (THE) as a percentage of GDP fluctuated between 5.2 per cent and 5.9 per cent, respectively, between the 2009 and 2013, with the highest proportion (5.9 per cent) observed in 2012 and 2013 (Table 23.1a). The GOJ's budget accounts for the largest share of health financing, however, IDPs also supplemented the government's allocation to health by inputs from The United States Agency for International Development (USAID); United Nations Children's Fund (UNICEF); the Global Fund; United Nations Population Fund (UNFPA); Inter-American Development Bank (IADB); Pan American Health Organization (PAHO)/World Health Organization (WHO), the diaspora and other charitable organizations locally and overseas {see chapter on Official Development Assistance}.

The General Government Health Expenditure (GGHE) ranged from a low of 2.9 per cent in 2009 to a high of 3.4 per cent in 2013. GGHE reflected as a percentage of the Total

TABLE 23.1a
NATIONAL EXPENDITURE ON HEALTH (J\$), 2009-2013

SELECTED INDICATORS	EXPENDITURE RATIO (%)				
	2009	2010	2011	2012	2013
Total Health Expenditure (THE) as a % Gross Domestic Product (GDP)	5.2	5.3	5.2	5.9	5.9
General Government Health Expenditure (GGHE) as a % of GDP	2.9	3.0	2.8	3.3	3.4
GGHE as a % of THE	56.1	56.3	53.6	55.7	58.1
Private Expenditure on Health (PvtHE) as a % of THE	43.9	43.7	46.4	45.8	41.9
Out of Pocket Expenditure as a % of THE	31.2	31.0	32.9	29.4	25.4

Source: Ministry of Health

3. PIOJ Comprehensive Assessment of Jamaica's Progress Toward the MDGs, A Review of Policies and Programmes (March 2014).
4. Reports in the Reproductive Health Survey (2008) indicated that at their last delivery, 65.0 per cent of women was attended to by a midwife and 33.0 per cent by a physician.

TABLE 23.1b
MINISTRY OF HEALTH AND ITS DEPARTMENTS
RECURRENT AND CAPITAL BUDGETS BY PROGRAMME, 2013/14-2014/15
(\$'000)

FUNCTIONS	REVISED ESTIMATES 2013/14	ESTIMATES 2014/15
RECURRENT		
Social Security and Welfare		
Prevention & Control of Drug Abuse	94 046.0	92 250.0
Total Social Security & Welfare	94 046.0	92 250.0
Health Affairs & Services		
Executive Direction & Administration	1 499 534.0	1 365 477.0
Training	307 025.0	281 430.0
Regional & International Cooperation	97 000.0	97 000.0
Disaster Management	69 342.0	48 456.0
Early Childhood Development	19 285.0	17 500.0
Health Services Support	714 453.0	709 268.0
Family Planning	110 028 .0	106 915.0
Health Service Delivery	33 727 311.0	32 252 977.0
Total Health Affairs and Services	36 543 978.0	34 879 023.0
Total Recurrent	36 638 024.0	34 971 273.0
Less Appropriation in Aid	300 352.0	200 352.0
Net Recurrent	36 337 672.0	34 770 921.0
DEPARTMENTS		
Registrar General's Department and Island Record Office	39 301.0 ^a	-
Bellevue Hospital	1 208 807.0	1 174 686.0
Government Chemist	28 581.0	28 479.0
Total Departments	1 276 689.0	1 203 165.0
Total Ministry of Health and Departments	35 060 983.0	33 567 756.0
CAPITAL A		
Social Security & Welfare Services		
Family Services	-	-
Prevention & Control of Drug Abuse	3 000.0	-
Total - Social Security & Welfare Services	3 000.0	-
Other Social & Community Services		
Disaster Management	-	-
Total Other Social & Community Services	-	-
Health Affairs & Services		
Health Services Support	-	-
Health Services Delivery	1 873 900.0	1 273 500.0
Total Health Affairs and Services	1 873 900.0	1 273 500.0
Total Capital A	1 876 900.0	1 273 500.0
Less Appropriation in Aid	1 870 400.0	1 273 500.0
Net Capital A	6 500.0	-
CAPITAL B		
Health Affairs & Services		
Health Services Support	548 205.0	903 423.0
Total Health Affairs and Services	548 205.0	903 423.0
Total Capital B	548 205.0	903 423.0
Total Capital A & B	554 705.0	903 423.0
Recurrent and Capital	35 615 688.0	34 471 179.0

a - Less Appropriation

Source: Estimates of Expenditure 2014/15

Health Expenditure (THE) moved to 58.1 per cent in 2013 from 56.1 per cent recorded in 2009. Private Expenditure on Health (PvtHE) as a percentage of THE moved from 43.9 in 2009 to 41.9 in 2013. Out of Pocket Expenditure as a percentage of THE had a 5.8 percentage points reduction from 31.2 per cent in 2009 (see Table 23.1a).

The Government's budgetary allocation to the sector⁵ for the Financial Year (FY) 2014/15 was estimated at approximately \$33.6 billion. Allocations to Health Affairs & Services and Departments decreased, however, Regional and International Cooperation allocations remained unchanged (Table 23.1b). The revised estimates for the FY 2013/2014 were \$35.1 billion.

The **Capital A Budget**, estimated at \$1.3 billion for FY 2014/15 was allocated entirely to Health Affairs & Services. This budget was funded by the National Health Fund through Appropriation in Aid. Revised estimates of expenditure for Capital A Budget in the FY 2013/2014 was \$1.9 billion. There was an estimated \$903.4 million in allocation to the **Capital B Budget** (see Table 23.1b).

The recurrent budget for health institutions was estimated at \$32.3 billion for the FY 2014/15. There was estimated decline in allocation to the University Hospital of the West Indies, all the RHAs, and the Jamaica/Cuba Eye Care Programme (Table 23.1c). Estimated allocations to the St Joseph Hospital remained unchanged. The revised estimate of expenditure for health institutions for the FY 2013/2014 was \$33.7 billion.

PERFORMANCE

Policy and Legislation

There were several major initiatives focusing on legislation, policies, plans and programmes in priority areas reflected in primary care renewal, customer service, pharmacy services, and the GOJ Health Card. Among these were:

- review of the *National HIV/AIDS Policy (2005)* to identify the successes and challenges, and address the gaps in the HIV/AIDS response and align the strategic priorities to international targets including the 90-90-90⁶ target to end the HIV/AIDS epidemic, and its inclusion in the Post-2015 Development Agenda
- approval of the National Infant and Young Child Feeding Policy by Cabinet. The overall aim is to strengthen the provision of maternal and child health services, and establish a sustainable mechanism for data on young child feeding in order to influence policy and programme development. The policy was tabled in Houses of Parliament in July 2014
- Policy guidelines for the management (custody) and administration of Misoprostal (Cytotec)⁷ tablets as a controlled drug in public and selected private hospitals
- Policy guidelines for the utilization of Government operated health facilities by trainers from medical, dental and schools for other health related professionals

TABLE 23.1c
MINISTRY OF HEALTH RECURRENT BUDGET
2013/14 and 2014/15
(\$'000)

HEALTH INSTITUTIONS	REVISED ESTIMATES 2013/14	ESTIMATES 2014/15
South East	13 332 986.0	12 401 788.0
North East	4 217 149.0	4 184 031.0
Western	6 051 343.0	5 978 352.0
Southern	5 723 030.0	5 599 821.0
University Hospital of the West Indies	4 099 990.0	3 801 277.0
St. Joseph's Hospital	239 352.0	239 352.0
Jamaica/Cuba Eye Care Programme	63 461.0	48 356.0
TOTAL	33 727 311.0	32 252 977.0

Source: Estimates of Expenditure 2014/15

5. The GOJ budgetary allocation as presented to the House of Representatives in the Estimates of Expenditures for the Financial Year (FY) 2014/15.
6. The 90-90-90 initiative aims that by 2020, 90 per cent of all people living with HIV will know their status; 90 per cent of all people with diagnosed HIV infection will receive sustained antiretroviral therapy; and 90 per cent of all people receiving antiretroviral therapy will have viral suppression.
7. Cytotec (Misoprostol) - is prescribed by some doctors to treat serious stomach ulcers but is also sold illegally to persons wanting to terminate pregnancy

- Policy guidelines for the operations of funeral establishment and mortuaries ensuring that there are accepted standards for managing mortuary operations in hospitals and private mortuaries. The guidelines are geared at preventing the spread of infectious diseases
- development of a draft National Integrated Strategic Plan (NISP) for Sexual Health and HIV (2014–2019). The draft plan reflects the integration of the services of the National Family Planning Board and the National HIV Programme to create a single sexual and reproductive health authority (see chapter on Population)
- development and pretesting of the Jamaica Food Based Dietary Guidelines, a framework for citizens to create proper and balanced meals to improve overall health
- publication of the study on the Law and Policy Framework for Adolescent Sexual and Reproductive Health (ASRH) in Jamaica – *A rights-based approach to assessing ASRH issues in Jamaican law and policy*. The study highlighted the lack of coherence in both the laws and policies of ASRH as well as gaps in service delivery
- publication of the Standards and Related Criteria for Adolescent Health—a guide for assuring quality

health services for adolescents (2015). The guide emphasizes the change in perspective and the need to focus on adolescents and adolescent health. It includes 10 standards and their related criteria for assessment

- capacity strengthening of three Child Protection Committees (CPCs) and revision of the CPC Handbook, providing guidance on the application of child rights, child abuse reporting and strategic and programme development, enabling government and NGOs of the parishes of St. Catherine, St. James and Clarendon to better plan for the promotion of child rights.

General Health Status

Life expectancy at birth was at 74.1 years in 2011 compared with approximately 71.5 years in 2005⁸, indicating that Jamaicans are living longer, suggesting an improvement of quality and access to health care over time, as well as improved health seeking behaviour. According to the *Jamaica Survey of Living Conditions⁹ (JSLC) 2012*, approximately 84.7 per cent of Jamaicans were reported as having generally good or very good health, a larger proportion of males (86.7 per cent) than females, (82.8 per cent) with quality of health status decreasing with age. Seventy-five per cent of those ill or injured sought care. The *JSLC 2012* also showed that a larger proportion of respondents (54.9 per cent) utilized public health facilities only. Persons in the Rural Areas (64.3

TABLE 23.2
PATIENTS SEEN IN ACCIDENT & EMERGENCY UNITS OF PUBLIC HOSPITALS
BY CONDITION, SEX AND AGE, 2014

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	35 826	2 687	1 839	2 929	1 855	4 663	2 293	4 119	1 981	3 805	2 237	3 032	2 248	1 125	1 192
Drowning/near drowning	25	3	3	3	1	3	3	3	0	1	0	3	0	2	0
Burns	1 096	183	123	65	48	107	73	71	74	88	73	72	72	15	30
Poisoning	683	180	157	35	23	29	39	25	40	36	45	28	22	13	10
Motor Vehicle Accidents	8 034	114	98	206	174	894	629	1 722	639	1 394	598	805	443	193	103
Accidental Lacerations	9 265	670	346	1 031	446	1 442	460	1 227	397	1 162	449	891	363	230	124
Bites	4 002	303	133	340	202	402	352	306	319	336	382	315	382	110	103
Falls	12 721	1 234	979	1 249	660	1 786	737	765	512	788	690	918	966	562	822
Intentional Injuries	8 630	97	102	179	179	1 046	1 288	1 255	1 001	1 232	767	812	380	182	81
Attempted Suicides	402	10	4	19	5	39	95	54	53	43	36	18	19	3	3
Stab Wounds	1 396	3	3	8	7	249	81	383	100	319	67	130	24	14	1
Gun Shot	540	0	1	1	1	58	6	186	28	138	20	74	11	15	1
Blunt Injury	5 223	79	52	140	79	670	457	620	689	720	590	583	306	149	72
Sexual Assault	1 069	5	42	11	87	30	649	12	131	12	54	7	20	1	4

Note: Data is provisional and was only available for the period January - September, 2014
Unknown ages were included in the total cases seen.
Data for Kingston Public Hospital not available

Source: Ministry of Health

8. STATIN Demographic Statistic 2013, Kingston: STATIN, 2013

9. PIOJ and STATIN 2012. Jamaica Survey of Living Condition 2012, Kingston, PIOJ

per cent), those among the poorest quintiles (77.1 per cent); and males (64.5 per cent) were the main users of public health facilities. Reported health insurance coverage decreased to 18.8 per cent compared with 19.5 per cent in 2010. The majority of persons (61.7 per cent) with health insurance that sought care used private health facilities. Of the persons without insurance coverage, 32.3 per cent visited private facilities while the majority (61.4 per cent) visited public health facilities with the largest proportion (64.8 per cent) from the Kingston Metropolitan Area.

Data from the *JSLC 2012* revealed that 20.5 per cent of ill or injured Jamaicans who did not seek care reported that they could not afford it, of whom, a larger proportion (24.5 per cent) were females. Of the subgroup that could not afford care, 48.9 per cent of persons stated that they preferred home remedies. One in every four respondents reported having at least one chronic disease; the most prevalent was Hypertension (11.6 per cent). Comorbidity¹⁰ increased to 36.4 per cent compared with 19.8 per cent in 2010, indicating that more persons reported having two or more NCDs. Approximately 12.6 per cent of the respondents 14 years and older smoked, of which males accounted for 22.5 per cent compared with 3.6 per cent among females.

During the year, mortality and morbidity were affected by the NCDs, injuries, emerging and re-emerging diseases which challenged the demand of health service delivery. The crude death rate was 6.7 per 1 000 population (see chapter on Population). Data in 2013 indicated that cardiovascular diseases (2 208), diabetes mellitus (1 914), hypertension (1 274), and ischaemic heart disease (1 248) were some the leading causes of death among Jamaicans five years old and over. Death by these diseases was higher among females. Deaths by external causes (1 583) and malignant neoplasm of the prostate (628) were among the top five causes of death among men. Common causes of death by cancers among females included, malignant neoplasm of breast (339) and cervix uteri (158)¹¹.

Increase in the public health burden was influenced by the redirection of funds and human resources to deal with the impact of the Chik V outbreak, violence-related, and other injuries and NCDs including hypertension, cardiovascular diseases, diabetes and mental health disorders. Public health facilities across the island reported 44 456 visits to

the Accident and Emergency departments for treatment of injuries, 9.3 per cent lower than total injuries seen in the corresponding period in 2013. Of the total visits, 80.6 per cent were Unintentional Injuries with highest occurrence in Falls, Accidental Lacerations, and Motor Vehicle Accidents. Among Intentional Injuries, cases of Blunt Injuries (60.5 per cent), Stab Wounds (16.2 per cent) and Sexual Assault (12.4 per cent) were most frequently seen (see Table 23.2).

The MOH and three of its stakeholders CHASE¹² Fund, Jamaica Social Investment Fund (JSIF) and the National Health Fund (NHF)—continued to make investment in primary and secondary care through infrastructural improvements and equipment acquisition. Improvement in primary health care was fulfilled in part by the Primary Health Care Renewal Programme which contained a programmatic guide for efficient flexible community-based care with a wider service mix focusing on healthy lifestyles. This was further enhanced by the completion of two of the Centres of Excellence (Claremont and Santa Cruz Health Centres) and reopening and refurbishing of others. Parallel to these efforts investments were also made in secondary care facilities. Access to services was also improved as the NHF continued to expand individual benefits received by Jamaicans by adding new pharmaceutical drugs for the treatment of NCDs.

Health research is an important means of producing knowledge and for directing scarce resources to address health priorities. During the year, an Essential National Health Research Committee (ENHRC) was established to provide leadership, expertise, direction and guidance with respect to research for health. The ENHRC comprises representatives from various agencies including the Ministry of Health and RHAs, educational institutions, PAHO/WHO, CARPHA, STATIN, PIOJ, the Scientific Research Council (SRC), Medical and Nursing Associations of Jamaica, the Advisory Panel on Ethics and Medico-Legal Affairs and the National Consumer League. The committee took initial steps in developing a strategic framework for a national research agenda.

Chikungunya Virus (Chik V)

The first notified case of the Chik V¹³ in Jamaica was reported in epidemiology week (EW) 9¹⁴—week ending March 1, 2014. Since then 4 667 notifications¹⁵ were made to the MOH, of which 1 605 were classified as suspected. Of the

10. Comorbidity is the presence of one or more additional disorders, example a combination of diabetes and hypertension

11. Demographic statistics 2013, Kingston STATIN 2013

12. The Culture, Health, Arts, Sports and Education (CHASE) Fund

13. Cases of Chik V were defined as suspected or confirmed. SUSPECTED CASE : Fever of acute onset of >101.3°F (38.5°C) and severe arthralgia (or arthritis) not explained by other medical conditions, in someone who resides in or has visited epidemic or endemic areas within two weeks prior to the onset of symptoms; CONFIRMED CASE: A suspected case with a positive result in any of the following Chikungunya Virus (CHIK V) specific tests: Viral isolation, detection of viral RNA by RT-PCR, detection of IgM in a single serum sample (collected during acute or convalescent phase) or four-fold increase in CHIK V-specific antibody titers (samples collected at least two to three weeks apart).

14. PAHO/WHO Epidemiology Week Schedule 2014 (Week ending January 4, 2014 – Week ending January 3, 2015).

15. Notifications may not have reflected the prevalence of the diseases due to limited number of persons that visited the health centres during the outbreak.

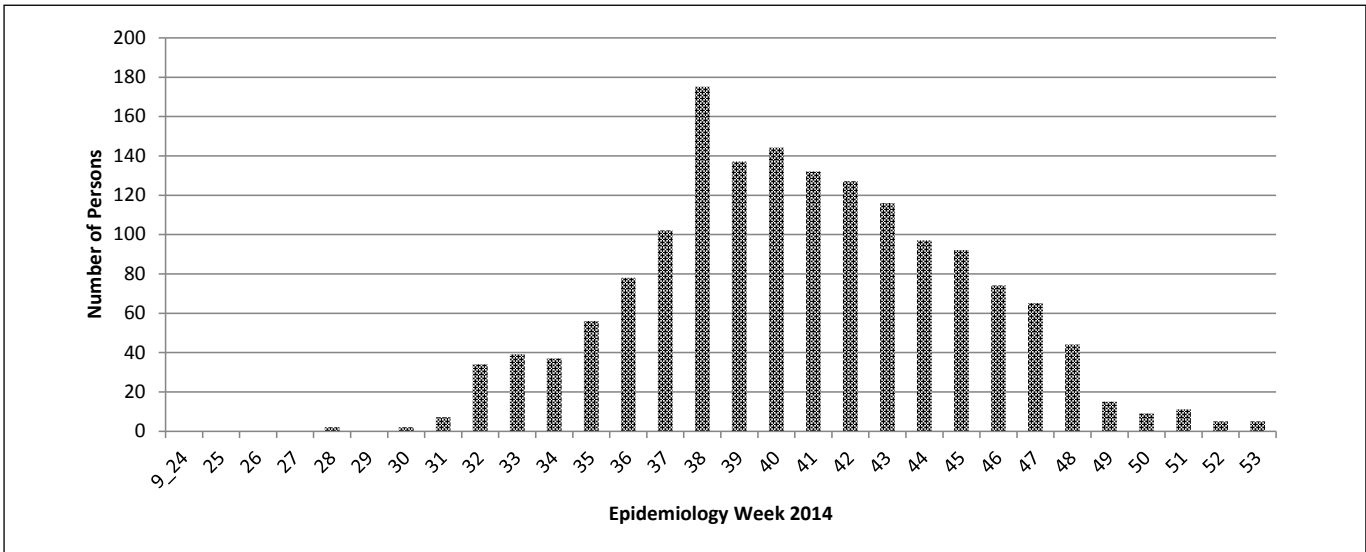


FIGURE 23A: EPIDEMIC CURVE: NUMBER OF SUSPECTED CASES OF CHIKUNGUNYA VIRUS BY EPIDEMIOLOGICAL WEEK*, JAMAICA 2014

Note: Suspected = Total suspected-Discarded

*PAHO/WHO Epidemiology Week Schedule 2014 (Week ending January 4, 2014 – Week ending January 3, 2015)

1 605 suspected cases—based on the clinical definition of the disease—89 were laboratory confirmed, 66 were epidemiologically linked and 48 were discarded based on a negative laboratory test. There were also suspected Chikungunya-related deaths. As at the end of the calendar year, 14 notifications of related deaths were received and processed by the National Surveillance Unit, MOH. Insufficient data was submitted for five of the 14 notifications and hence these were unable to be classified. Of the nine remaining notifications, six fit the case definition for a suspected Chik V and three were classified as not suspected. Of the six suspected cases of Chik V related deaths, two were confirmed, one was discarded as there was a negative laboratory result from Caribbean Public Health Agency, (CARPHA) and the other three remain under investigation.

The age of the cases (suspected and confirmed) ranged from 6 days to 95 years with a mean age of 28.5 years and the

median age was 26 years. The majority of persons affected (924) were in the working age population (20-64 years) {Table 23.3}. Generally the greatest number of suspected cases per week appeared to have occurred earliest for St. Thomas EW 32, St. Ann EW 37, St. Catherine EW 38, and KSA EW 42 (Appendix 23A). The epidemiological curve reflected a peak in the number of cases (500) in EW 36, thereafter there was a gradual decline in the number of reported cases (Figure 23A).

The MOH, has collaborated with health researchers nationally and regionally, to investigate and characterize the Chik V outbreak in Jamaica through the establishment of the National Chik V Research Committee. Key deliverables included: understanding the extent of the outbreak; the medium- and long-term effect on the population; and the development of guidelines for the management of Chik V specific to Jamaica.

**TABLE 23.3
DISTRIBUTION OF SUSPECTED CHICKUNGUNYA CASES BY AGE AND SEX, 2014**

AGE CATEGORY	FEMALE	MALE	UNKNOWN	TOTAL
0-4	74	93	0	167
5-9	43	57	0	100
10-19	162	119	2	283
20-64	659	265	1	924
65+	43	28	0	71
Unknown	21	9	3	33
Total	1 002	571	6	1 578

Note: Figures do not contain discarded cases

Reported cases to the Ministry of Health is as at December 31, 2014

Source: Ministry of Health

Ebola Preparedness

According to the WHO, the Ebola Virus Disease (EVD)¹⁶ is a fatal illness in humans. During an outbreak, the WHO responds by supporting surveillance, community engagement, case management, laboratory services, contact tracing, infection control, logistical support, training, and assistance with safe burial practices. The GOJ was proactive in establishing the MOH as lead agency of a national response team in light of the country's need for Ebola Preparedness. Other key agencies involved in the national response efforts included the Office of Disaster Preparedness and Emergency Management (ODPEM), the Jamaica Defence Force (JDF) and the Jamaica Constabulary Force. Sensitisation and refresher training sessions on operating procedures and protocols were held. Specific entities and professionals were earmarked as first responders and supplies made available in health facilities in case of an event. Two established quarantine facilities were identified and other equipped medical isolation wards were also identified in hospitals across the island. Ongoing screening equipment was also made available at the ports of entry to assist in identification of suspected cases. A National Ebola Preparedness Committee was commissioned by the Office of the Prime Minister with the MOH as lead agency for contingency planning and the country's health emergency response. Public education campaigns and training of professionals and support staff were undertaken on treatment and care of both Chik V and Ebola Virus Diseases

Health Status by age

0–9 years

There are a total of 411 200 children in this age group constituting 15.1 per cent of the total population (see chapter on Population). Key issues affecting this age group remain immunization, nutrition, safety and Chik V. In the 0–9 age group, reports from the Surveillance Unit of the MOH indicated that there were 267 suspected cases of children infected Chik V (see Table 23.3). Over 20 000 children in this age group were admitted to hospitals islandwide. The MOH data for Accident and Emergency units in public hospitals reports indicated that 9 867 children suffered from Unintentional and Intentional Injuries compared with 10 821 in 2013, an 8.8 per cent decline. The main reasons for visits to the Accident and Emergency unit were Falls (4 122), Accidental Lacerations (2 493), Bites (978), Motor Vehicle Accidents (592), Burns (419) and Poisoning (395) as well as Blunt Injuries (350) {see Table 23.2}.

The MOH continued to monitor infant nutrition through breastfeeding practices. Between January and September 2014, a total of 23 058 babies up to three months old were seen in the public health centres. Some 47.1 per cent were

exclusively breast-fed at six weeks compared with 44.7 per cent in 2013. This was consistently below the MOH target of 60.0 per cent exclusive breastfeeding at six weeks under the MOH/UNICEF Baby-Friendly Hospital Initiative (BFHI)¹⁷. At three months, a reported 245 were exclusively breast-fed. Funding of this initiative ended over the period, however, monitoring continued. Some 30 Medical Doctors from the Victoria Jubilee Hospital were trained in *Breastfeeding Promotion and Support in a Baby-Friendly Hospital*. The implementation of BFHI in other targeted hospitals progressed at a slow pace. A brochure, *A Mother's Guide to Breastfeeding*, targeting postnatal women, was developed by the MOH. Over 42 000 copies were disseminated in hospitals islandwide.

10–19 years

Of the total population in Jamaica, the 10–19 age group constituted 19.0 per cent totalling 516 100 (see chapter on Population). Issues affecting this group were mainly falls, motor vehicle accidents, violence, mental health, sexual and reproductive health, and Chik V. Reports from the MOH indicated that among children 10–19 years there were 283 suspected cases of Chik V (see Table 23.3).

Data from public hospitals revealed that this age group accounted for 20.9 per cent of all injuries seen between January and September 2014. The occurrence of Intentional and Unintentional Injuries was higher among males (61.5 per cent) (see Table 23.2). Falls (31.3 per cent), Accidental Lacerations (33.3 per cent), and Motor Vehicle Accidents (26.6 per cent) were more prevalent among males. Incidence of sexual assault (18.9 per cent) was higher among females. One in every three reported cases of Attempted Suicide (33.3 per cent) was among this age cohort, with a higher proportion among females (70.8 per cent). A national study on Causes of Suicide among children and adolescents, conducted by MOH in collaboration with UNICEF revealed that 20.0 per cent of adolescents are at risk for committing suicide; the most common reason being interpersonal conflict and the most common method of suicide attempt was drug overdose. The data showed a relationship between lack of parental attention to school work and suicide risk. It also found that 16.7 per cent of the representative sample (3 471) of children and adolescents in schools have experienced suicidal ideation, with more girls than boys reporting such thoughts. Although this is a low risk group for chronic diseases, there were 50 and 33 newly diagnosed cases of diabetes and hypertension, respectively. Data from the *JSLC 2012* showed an increase in the proportion of persons 14–29 years who smoked. Reports from the National Secondary School Survey 2013 also indicated that alcohol use was higher among older students (age 17+ years).

16. <http://www.who.int/mediacentre/factsheets/fs103/en/>

17. <http://www.unicef.org/programme/breastfeeding/baby.htm>

20–64 years

The group totalled 1 562 200 and constituted 57.4 per cent of the population (see chapter on Population). Data from the *JSLC 2012* revealed that the working age population accounted for the majority of Jamaicans with mental illness (83.8 per cent), hypertension (60.1 per cent), diabetes (54.7 per cent), reflecting a larger share among females than males for hypertension and diabetes. More males reported having mental illnesses. Reports from the MOH Monthly Clinical Statistical Reports indicated that there were 1 292 newly diagnosed cases of diabetes mellitus and 2 973 cases of hypertension in public health facilities during the year. Some 35,440 cases of other cardiovascular diseases were also seen among this age group of which females accounted for 72.9 per cent.

Over 50.0 per cent of persons who sought care in the emergency units across the island were among this age group. The largest number of suspected Chik V cases (924) occurred among persons 15–64 years. Falls (23.5 per cent) accounted for the highest proportion of injuries followed by Accidental Lacerations (18.8 per cent), Blunt Injury (14.7 per cent), Bites (8.5 per cent); and Motor Vehicle Accidents (4.9 per cent). Violent Injury by Gun Shot (84.8 per cent) and Motor Vehicle Accident (69.7 per cent) was highest among this age group. Persons in the 20–44 years age group accounted for 69.0 per cent of cases of Gun Shot wounds with the majority (60.1 per cent) being males (see Table 23.2).

65 years and over

There were 233 700 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. Between January and September 2014, data from the public health centres showed a

total of 1 204 persons 60 years and over, newly diagnosed with Diabetes and hypertension compared with 963 in 2013. There were 276 and 928 new cases of Diabetes and Hypertension. There was not much difference between the number of males and females newly diagnosed with hypertension, however, females accounted for 58.3 per cent of new diabetic cases. The least suspected cases of persons with Chik V (71) were reported among this age group, more females (43) were affected (Table 23.3)

The 65 years and over age group accounted for approximately 5.8 per cent of the persons who accessed emergency care in public hospitals. This age group accounted for some 10.9 per cent of cases of Unintentional Injury, mainly from Falls (1 384), Accidental Lacerations (354), and (575) Motor Vehicle Accidents (296). Prevalence of Unintentional Injuries was generally higher in males. Males accounted for the majority of the Lacerations, 64.9 per cent, while females accounted for most Falls (59.4 per cent). Other injury-related illness for which they sought care included Blunt Injury, which accounted for 2.7 per cent of all Intentional injuries, of which, 56.9 per cent was males (see Table 23.2).

HEALTH SERVICE DELIVERY

Public health services were delivered through a network of primary secondary and tertiary level health facilities comprising 24 hospitals (including University Hospital of the West Indies (UHWI) and 317 health centres geographically distributed throughout the four RHAs (Table 23.4). There are 10 private hospitals and over 495 pharmacies; the public health sector accounts for some 4 568 hospital beds and the private sector provides approximately 200 beds.

Primary level health care refers to visits to health centres and community hospitals. Health centres are classified as Types 1–5 in relation to services offered and population

TABLE 23.4
NETWORK OF SERVICE DELIVERY FACILITIES, 2014

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	1 284 300	58 157	57 506
North East	Portland, St. Mary, St. Ann	74	4	371 200	21 870	21 786
Western	Trelawny, St. James, Hanover, Westmoreland	80	4	477 100	23 966	24 997
Southern	St. Elizabeth, Manchester, Clarendon	73	5	590 600	24 813	24 795
TOTAL		317	23	2 723 200	139 203	139 471
UHWI					10 397	10 387

Note: Admission and Discharges are for the period January-September, 2014
End of year population figures are used

Source: Ministry of Health and the Statistical Institute of Jamaica

TABLE 23.5
HEALTH INFORMATION MANAGEMENT INDICATORS, 2014

INDICATOR	SRHA ^a	SERHA ^a	NERHA ^a	WRHA ^a
A & E visits/Casualty Attendees	118 931	128 117	81 100	122 940
Out-patient visits	73 551	180 343	41 694	94 339
Average bed complement	613	2 385	543	683
Admissions	24 813	58 119	21 870	23 966
Bed Occupancy (%)	81.7	72.9	75.1	86.2
Average length of stay in hospital (days)	5.5	5.6	4.7	6.5
Operations ^b	10 444	17 125	5 326	11 159
Total births	5 492	9 113	32 55	5 228

a - Provisional data January - September, 2014

b - Operations include day surgery and minor operations

Source: Ministry of Health

served. Secondary and tertiary level services referred to care offered in Hospitals classified as Types A, B, C and Specialist according to bed capacity and services offered. Three institutions continued to deliver tertiary level services — Kingston Public Hospital (KPH), Cornwall Regional Hospital (CRH) and UHWI¹⁸. Specialized care was offered through the Bustamante Hospital for Children, Victoria Jubilee, Bellevue, National Chest, Hope Institute, and Sir John Golding Rehabilitation Centre. Throughout the island, both primary and secondary care facilities also operate as training facilities.

Health Systems Performance of the RHAs

The RHAs are governed by agreements, treaties, conventions, national strategic plans and priorities. These include but are not limited to the MDGs; International Health Regulations; *Vision 2030 Jamaica – National Development Plan*; Essential Public Health Functions; and MOH Service Level Agreement; and Strategic Plans. Similar challenges faced throughout the four regional authorities included: inadequate staffing; unmet supply to the pharmaceutical demands of the population served; and inadequate budgetary allocations (the actual expenditure exceeded in all instances the budgetary allocations). This shortfall impacted the unmet need of the pharmaceutical and laboratory services and recruitment of critical hospital staff. There were successes, however, in immunization, health promotion for the reduction of NCDs, continued infrastructural improvements, and procurement of equipment across the regions for the maintenance of equity and access to care.

Southern Regional Health Authority (SRHA)

Health service delivery was evaluated based on the following indicators: bed complement of 613 for a population

of 590 600; 24 813 admissions with a bed occupancy rate of 81.7 per cent, and patients were admitted for 5.5 days on average (Tables 23.4 and 23.5). Achievements for the region included: treatment of the NCDs; 30.0 per cent target achieved for cervical cancer screening among women 15-49 years; 64.4 per cent target of pharmaceutical demand; build awareness for healthy lifestyles to reduce risks for NCDs was maintained through six weekly after work exercise programmes in the region.

During January-September 2014, more than 50.0 per cent of the target for immunization coverage of infants 0–11 months was met (Table 23.6). Strategies included vaccination in hospital postnatal clinics and house to house immunizations, however, there were inadequate numbers of Community Health Aides to monitor all mothers who stopped attending or missed (dropout) clinic appointment.

Under the Environmental Health programme 100.0 per cent of vector breeding sites were treated, *Aedes aegypti Larval Index*¹⁹ was 20.7 per cent exceeding target of 15.0 per cent. The vector control programme was impacted by inadequate funding. Other successes in the region included:

- a 10.0 per cent reduction in maternal deaths
- increased surgical output of 20.0 per cent
- health education and promotion programmes on the Chik V reached over 8 000 persons, extensive Ebola preparedness training covered over 700 health professionals of all categories;
- several infrastructural improvements and renovations on both primary and secondary health care facilities.

18. Health care institutions classified as “tertiary” are Type A hospitals and facilitates training.

19. *Aedes aegypti Larval Index* is a ratio of the amount of containers inspected and how many were breeding larva.

TABLE 23.6
IMMUNIZATION COVERAGE FOR REGIONAL HEALTH AUTHORITIES (RHAs), 2014

INDICATOR	SRHA ^a	SERHA ^a	NRHA ^a	WRHA ^a
95.0% coverage of infant 0–11 months	68.0	44.8	47.5	47.4
BCG	66.0	42.0	45.0	44.1
Penta (DPT/DT)	71.0	48.0	52.0	51.3
OPV	69.0	48.0	52.0	50.8
MMR	66.0	41.0	41.0	43.4

a - Provisional data January – September, 2014

Source: Ministry of Health

North East Regional Health Authority (NERHA)

Bed complement in 2014 was 543²⁰ compared with 493 in 2013. Serving a population of 371 200 a total of 21 870 admissions with a bed occupancy rate of 75.1 per cent and average length stay in hospital was 4.7 days. Some 41 694 persons were seen in out-patient care and 81 100 were cared for in emergency rooms across the region (see Table 23.5). Priority programmes in the region included the treatment for the NCDs—hypertension and diabetes more prevalent in females—and total immunization coverage of 47.5 per cent (see Table 23.6). Vector control was also a priority programme and 90.0 per cent of the early childhood institutions were inspected. *Aedes aegypti Larval Index* was 16.6 per cent and exceeded the target of 15.0 per cent. Other achievements of the region included:

- expansion of an operating theatre
- acquisition of critical medical equipment for secondary care services
- procurement of equipment for radiology services
- infrastructural improvements of health centre.

Western Regional Health Authority

The health performance indicators showed a bed complement of 683. Serving a population of approximately 477 100, a total of 23 966 patients were admitted resulting in a bed occupancy rate of 86.2 per cent and average length of hospital stay 6.5 days (see Table 23.5). Priority programmes included: interventions and programmes to address the leading cause of death in the region over the period; the NCDs—health promotion activities were focused mainly on cooperate wellness and fitness activities in health facilities; coordination of patient education and building alliance with

key stakeholders; and media in health promotion activities—reduction in maternal deaths in the regions facilities. In sustaining environmental health the region engaged in integrated vector management through collaboration with stakeholders. The *Aedes aegypti Larval Index* was at 17.7 per cent which also exceeded the target of 15.0 per cent. Other achievements included completed infrastructural work on primary care facilities and extending the working hours in primary care facilities to supply the demand of services. This intervention was challenged by inadequate staffing and lack of additional resources for maintenance.

South East Regional Health Authority (SERHA)

Serving a population of approximately 1 284 300, the health performance indicators showed that a total of 58 119 patients were admitted with a bed complement of 2 385, an occupancy rate of 72.9 per cent and average length of hospital stay 5.6 days (see Tables 23.4 and 23.5). The priority focus of the region during the period was to respond to health emergency of the Chik V outbreak which impacted service delivery by increasing the activities and spending for surveillance and integrated vector action for mosquitoes. *Aedes aegypti Larval Index* at 12.9 per cent fell below SERHA's 2013–2014 target of 15.0 per cent. Inspection of early childhood institutions was reported at 34.0 per cent, below the 80.0 per cent target. Additional responses were made to other associated outbreaks in hospitals and Ebola preparedness. As the region with the final referral hospitals, there was overcrowding in key secondary care institutions which increased the demand for human resource. Efforts continued in the control of the NCDs through health promotion activities, improvement in infrastructure in primary health care facilities, nutrition and quality assurance. Immunization coverage was 44.8 per cent exceeding the target for the January–September period (Table 23.6). The region reported that some of the challenges faced were data collection

20. The bed complement increased because Annotto Bay Hospital added more beds subsequent to renovation after the storm. Additionally, St. Ann's Bay Hospital expanded and as such, new beds were added to the complement.

to reflect patient outcomes, difficulties in maintaining supplies of family planning commodities, and inadequate staffing and services in mental health in secondary care.

Primary Health Care

Primary health care remained a strategic priority for the MOH. Increase use of primary health care facilities continued to be influenced by Jamaica's epidemiological and demographic shifts as well as exposure to several other risk factors (see chapter on Population). In keeping with the framework of Universal Health Coverage (UHC), the MOH conceptualised a long-term plan for the Renewal of Primary Health Care. The proposed programme has focused on infrastructural improvements, refurbishing and reopening of strategic sites, and extended working hours in selected health centres. Among these was the continuation of the upgrade and expansion of four Centres of Excellence amounting to over \$415 million dollars (\$100 million Phase 1, and \$315 million Phase 2):

- **Santa Cruz Health Centre, St Elizabeth** – was completed, improvements to facility included modification and expansion to the dental area, construction of a new Maternal and Child Health area, and an expansion of the building to create a laboratory
- **Darliston Health Centre, Westmoreland** – Phase 1 was completed with the installation of air conditioning units and a solar system as well as construction of a conference centre and a staff welfare block. The tender process for Phase 2 continued
- **Isaac Barrant, St Thomas** – professional services for Phase 2 commenced and sought to address improvements to the curative, maternal and child health areas; construction of a minor operating theatre; electrical upgrade; and training area. Design for the

maternal ward and operating theatre was finalised and the tender was launched for purchase of the equipment

- **Claremont Health Centre, St Ann** – all improvements to this centre have been completed and included expansion of the old building and construction of a new building to include a laboratory, pharmacy, counselling room, staff lounge and public bathroom facility.

Primary care services were unable to meet the increasing demands varying from an increase in the prevalence of NCDs; emerging and re-emerging diseases; shortages in professional staff; and inability to meet targets of the RHAs service level agreements. Inability to meet these demands impacted client utilization of the services and resulted in patients accessing secondary health care facilities and increasing inappropriate use of hospitals for non-emergencies.

Provisional data of visits to all public health centres for the period January–September 2014 was 1 207 186. More females (871 773) visited the health centres for care. Of the total, curative visits accounted for 755 647 or 62.6 per cent. The leading three causes for visits and the proportion of persons seeking care for the conditions have remained unchanged: Hypertension 27.8 per cent, Genito-Urinary Diseases (including STDs) 18.8 per cent, and respiratory diseases 18.2 per cent (Table 23.7). Over the nine-month period, visits for Hypertension (158 976) continued to rank the highest among curative visits nationally and across the RHAs. Of note, 8.2 per cent of visits were for psychiatric illnesses.

Primary care facilities islandwide actively engaged in several Chik V interventions and Ebola preparedness activities. The widespread outbreak of Chik V impacted primary health care facilities. The SERHA reported high absenteeism among health practitioners due to illness during the 22–47 week of the outbreak. There was also increased spending on surveillance and integrated vector action.

TABLE 23.7
CURATIVE VISITS TO PRIMARY HEALTH CARE FACILITIES BY LEADING
CONDITIONS AND REGION, PUBLIC HEALTH SECTOR, 2014

DIAGNOSIS	South East	North East	Western	Southern	Jamaica	
	No. Visits	No. Visits	No. Visits	No. Visits	No. Visits	% of top 6 visits
Hypertension	62 692	27 454	33 793	35 037	158 976	27.8
Diseases of the Respiratory Tract	362 592	10 898	15 191	15 296	103 977	18.2
Genito- Urinary Diseases (including STD)	64 210	15 519	15 402	12 513	107 644	18.8
Skin Disease	43 317	14 514	14 846	13 669	86 346	15.1
Musculoskeletal	26 284	13 547	14 541	13 777	68 149	11.9
Psychiatry	22 974	7 717	8 635	7 706	47 032	8.2
TOTAL	582 069	89 649	102 408	97 998	572 124	100.0

Note: Data provisional; only available for the period January – September, 2014.

Source: Ministry of Health

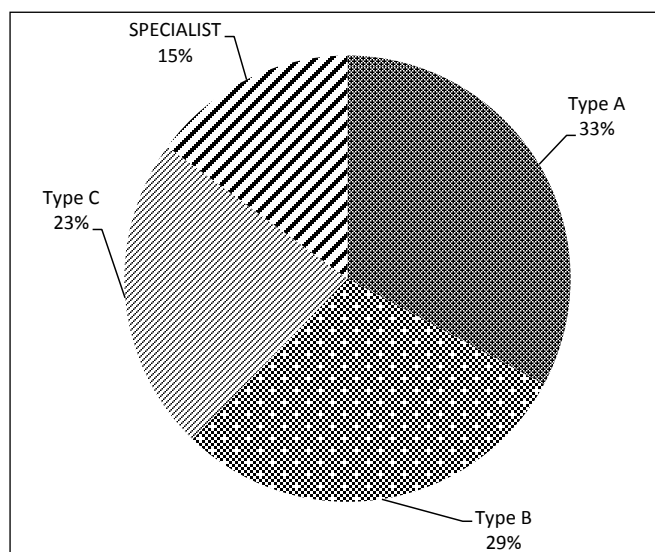


FIGURE 23B: TOTAL ADMISSIONS BY HOSPITAL TYPES, 2014

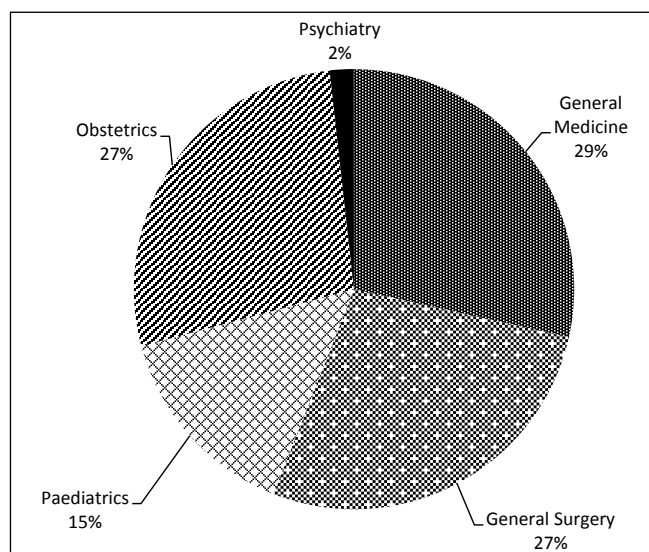


FIGURE 23C: TOTAL ADMISSIONS BY SPECIALITY

Secondary and Tertiary Health Care

During the period January–September, there were 149 600²¹ admissions to public secondary and tertiary care facilities inclusive of UHWI (see Table 23.4) compared with 142 466 in the previous year. Overall admissions were dependent on the type of hospital. Type A hospitals accounted for highest proportion of admissions (33.0 per cent) because of the extensive services offered while specialist hospitals

reported the lowest proportion number of admissions 15.0 per cent (Figure 23B).

There were five main clinical specialities in Public Hospitals—General Medicine; General Surgery; Paediatrics; Obstetrics; and Psychiatry (Figure 23C). Generally, there was an increase in admissions in all specialities, even though General Medicine continued to account for the highest number of cases compared with 2013.

TABLE 23.8
INDICATORS OF UTILIZATION OF ACUTE SECONDARY CARE
FACILITIES IN THE PUBLIC HEALTH SECTOR, 2012-2014

INDICATOR	2012	2013 ^r	2014 ^p
Mean Bed Complement	5 001	4 746	4757
In-patient Discharges	200 945	141 764	139 415
Bed Occupancy (%)	67.8	72.8	73.9
Average Length of Stay (days)	5.0	5.6	5.7
Annual Turnover Rate (mean %)	39.7	29.5	29.8
Death Rate Per 1 000 Discharges	41.2	44.2	46.4
Deliveries	38 049	26 389	24 495
Total Live Births	37 408	25 972	24 141
Out-Patient Visits	664 084	505 094	453 555
Casualty Attendance	776 464	516 041	483 536
Pharmacy (patients seen)	906 464	635 087	525 762
Pharmacy (items dispensed)	2 452 210	1 781 494	1 450 494

r - Revised: January – September.

p - Provisional figures for the period January – September, 2014

Note: Death rate calculated per 1 000 discharges

KPH and UHWI are also referred to as tertiary health facilities as they provide teaching/training to medical students

Source: Ministry of Health

21. Total admissions for the period include UHWI.

There was a 73.9 per cent bed occupancy reported, with a mean bed complement of 4 757, an increase of 0.2 per cent relative to the corresponding period in 2013. Average length of stay in hospitals was 5.7 days up from 5.6 days in the previous period. The in-patient discharges declined to 139 415 compared with 141 764 in the previous period. This decline over the last three years is indicative of an overall decrease in admissions to secondary and tertiary care institutions. The death rate rose to 46.4 deaths per 1 000 discharges compared with 44.2 deaths per 1 000 discharges in the corresponding period (Table 23.8). This may be a reflection of inpatient care or disease process, and the ageing population. There was also a gradual decrease in the number of casualty attendances which may mean an increase in the use of primary care facilities.

HEALTH SYSTEMS STRENGTHENING

Health Financing

The MOH continues to pursue innovative ways of financing the public health sector. In the 2012 Sustainable Financing and Reform of the Health Sector study conducted by IOS Partners Inc²², the financing gap in the health sector was estimated to be approximately 0.3 per cent of GDP in 2014. The health financing agenda has moved forward, and of the potential revenue sources that have been identified (along with revenue estimates), the approval has been given for the option of increasing the fees for private patients and patients with private health insurance. Negotiations surrounding the other options continued with the Ministry of Finance and Planning within the context of the wider macro-economic constraints.

GOJ Health Card

Preparation for the implementation phase of the GOJ Health Card commenced in 2013 and sought to improve the monitoring of public drugs and other resources consumed in public health facilities. Registration for the GOJ Health Card commenced in February 2014 and use of the card in health care facilities commenced on March 3, 2014. Combined usage of the NHF and GOJ health cards was recorded for over 300 000 persons. GOJ only (non NHF enrollees) enrolment was at 140 000. The total number of persons enrolled (including NHF enrollees) was 516 000.

e-Health

E-Health remains an important revolution in effective and efficient delivery of health information and services. The implementation is being guided by National Health Information Systems Strengthening and e-Health Strategic Plan 2014–2018, supported by commitment from the WHO. With assistance from the Universal Service Fund (USF), there was installation of Wide Area Network connection points to 60 health facilities as a major activity surrounding

the implementation of the Electronic Patient Administration System (e-PAS). During 2014, the implementation phase of the e-Health project was piloted in both the Darliston and Santa Cruz Centres of Excellence. The key deliverables in this implementation period were report generation, patient records data importation, and ongoing development for implementation in other institutions. Capacity building exercises were conducted concurrently with the implementation of the system and among those trained were records clerks and hospital administrators.

Up to October 2014, demographic data for 1 397 patients were entered into the system, 728 appointments were generated, and 854 patient evaluations were created. Inadequate local transformation capacity and budgetary concerns were the main challenges experienced during the pilot. There were budgetary challenges which delayed the project deliverables as the programme implementation continued to be funded largely by the NHF. Other funding sources were explored to adequately fund the large scale implementation in the remaining centres of excellence and four regional hospitals; to establish a programme office; and recruit additional human resource and technical staff. In addressing the regulatory framework of the e-Health Strategic Plan 2014-2018, a three-pronged approach was proposed to include the development of a health information system policy, health privacy legislation, and policy guidelines for electronic patient management records. A draft policy guideline for the electronic patient management record was developed.

Mental Health

The mental health objectives of the MOH are to promote mental health, prevent mental illness and reduce disability related to mental disorders through public education and training. The MOH reported that mental health-related visits were among the top five speciality admissions in hospitals and one of the top six curative visits to health centres. A total of 47 032 clients with psychiatric illnesses visited health centres (see Table 23.7) and 2 441 were admitted to hospital.

Mental health was given priority for human resource training and policy development. Revision of the protocol for management of patients with mental disorders was completed in July 2014, with over 100 copies printed and disseminated. There was priority training for 60 mental health workers in the use of the protocol with specific focus on the management of mental health disorders and human rights approach. Doctors, nurses and psychiatric aides were also trained in the protocol for the use of restraints and seclusion. Quality assurance initiatives were designed to improve community health services in response to the mentally-ill clients. To improve the quality of the delivery of mental health services there were six

22. IOS Partners, Inc. is an international economic development and financial advisory services firm that provides consultancy services to government intuitions, multi and bilateral agencies and private sector.

monitoring visits to adult mental health facilities. The visits provided feedback on the activities and non-conformance in the field. Funding was secured and a Terms of Reference was developed toward the formulation of a Mental Health Workplace Policy. This policy will guide the issues of mental health disorders among persons in the labour force.

Child and Adolescent Mental Health

Of all the reported cases of attempted suicide, the age group (10–19 years) accounted for the majority visits to ambulatory care (33.3 per cent) {see Table 23.2}. There was a reported 2 171 visits to Child Guidance Clinics in health facilities compared with 2 529 in the previous period, of which 18.0 per cent were new cases relative to 21.0 per cent in 2013. The clinics were most utilised in UHWI (30.8 per cent) and the WRHA (19.2 per cent).

The MOH conducted a UNICEF funded special study on “Youth Suicide in Jamaica” through the 2013 National School Survey. The study revealed that approximately 20.0 per cent of a sample of children from Grades 8–12 were at risk for suicidal behaviours (see chapter on Social Development, Social Protection and Culture). In addressing recommendations for prevention, a National Task Force was commissioned to develop an implementation plan based on the findings. The implementation plan outlines strategies to prevent suicide behaviours and improve management of attempted suicide among the youth population. In addressing child and adolescent mental health issues, a special mental health intervention was also conducted at the South Camp Juvenile Remand and Correctional Centre. A model therapeutic intervention combined a variety of therapeutic approaches for juvenile correctional centres resulting in the reduction in the high incidence of self-harm and suicide attempts over a six-month period to 5.0 per cent from 25.0 per cent at the South Camp facility. These recommended new approaches to rehabilitation were used by correctional officers, social workers, psychologists and psychiatrists in the juvenile correctional services.

Combined efforts between the MOH, Ministry of Education (MOE), Ministry of Youth and Culture (MYC), UNICEF and the European Union (EU) programme for reducing the juvenile population in state-run institutions, was completed. The main output of the project was the operationalization of a Mobile Mental Health Service (MMHS) called the “Smiles Mobile”. The project targeted 412 wards of the state (208 boys). Through a screening process, treatment commenced for 55 wards that were diagnosed with serious psychological disorders. The therapeutic interventions included individual and group therapy, psychiatric evaluations, intellectual testing,

and medication. The Mobile Mental Health intervention will be integrated into the Child Development Agency (CDA) and continue the objective of rehabilitative efforts to reintegrate youths in families, schools and homes (see chapter on Social Development, Social Protection and Culture).

Performance on the Health-Related Millennium Development Goals

Infant and Maternal Mortality

Despite accelerated efforts to achieve MDGs 4 and 5, it is unlikely that Jamaica will achieve the targets for infant and maternal mortality. This has strengthened the position for these targets to remain as priorities in the Post-2015 Development Agenda. Reports from a study using 2008 mortality data across the island, indicated that there was under-reporting of maternal deaths in Jamaica, attributed to delayed registration of coroners cases and misclassification of others. Recommendation from the study suggested timely registration of coroner’s case and training of nosologists²³ to recognise and code the underlying cause of maternal deaths²⁴. The Department of Child Health, at the University of the West Indies conducted an evaluation of the current status of maternal, paternal, newborn and infant health and well-being, and the impact of these on national child health and development in the early years. This longitudinal study was co-funded by UNICEF, IDB and local funding agencies. Extensive datasets were generated on the biological and social factors affecting maternal health, infant and child development, thereby addressing critical knowledge gaps in the health and early childhood sectors.

The MOH continued its implementation of the EU-funded project, Programme for the Reduction of Maternal and Child Mortality (PROMAC) with oversight from a Steering Committee. The objective of this programme is to attain MDG 4 — 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. The Project has five components:

- Component 1 – Newborn and emergency care
- Component 2 – Quality of primary health care and referral system
- Component 3 – Training and research
- Component 4 – Support to health seeking behaviour of target population
- Component 5 – Institutional support for programme implementation

23. Nosologists are Mortality Medical Coders.

24. Affette McCaw-Binns, Jasneeth Mullings, Yvette Holder. August 2014. Vital Registration and Under-Reporting of Maternal Mortality in Jamaica, , International Journal of Gynaecology and obstetrics.

Under the training of health professional component of the project, several training programmes have commenced. Through contractual agreement with the University of the West Indies, a scholarship was awarded for the training of health professionals—Fellowships in Neonatology, Maternal Foetal Medicine and Emergency Obstetrics, Critical Care Medicine, and Neonatology Nursing Tutors. The University of Technology also commenced the training of 35 Critical Care Nurses and the In-service Education Unit of the MOH established a course on Neonatology Nursing which commenced with 19 Nurses for all the RHAs. During the year, the Technical Assistance team was contracted and there were site visits to all the intervention hospitals and health centres

Over the period, January–September 2014, the MOH reported 23 659 cases of successful maternal deliveries compared to 28 666 for the corresponding period in 2013. In the public health sector, 78.2 per cent represented natural child birth and 21.8 per cent Caesarean section (C-section)²⁵ cases. Complications of pregnancy included postpartum haemorrhage which accounted for 47 cases and pre-eclampsia from which 52 women suffered. The MOH reported 22 maternal deaths within public hospitals for this period²⁶.

HIV/AIDS

Despite Jamaica's success in addressing the epidemic, HIV and AIDS still have the potential to significantly impede the social and economic development of the country and contribute to the poverty gap. Serious challenges have persisted or are emerging in many areas. There is an increase in the number of persons involved in multiple sexual partnerships and a high prevalence rate among men who have sex with men (MSM). Preliminary outputs from recent estimates/projections are indicating that Jamaica's epidemic is plateauing instead of continuing to decline. The prevalence of HIV/AIDS remained at 1.7 per cent in 2014 and mother to child transmission as at December 2014 was 1.4 per cent. Jamaica is close to achieving the zero target of mother to child transmission. During the year the MOH provided antiretroviral therapy (ART) to 8 835 persons living with HIV/AIDS.

Internationally, the focus of the HIV/AIDS response over the period was concentrated on the achievements of the HIV/AIDS-related MDGs. This initiative influenced the revision of the National HIV/AIDS Policy (2005) which will guide the future of the national response. Since 2005, HIV/AIDS infection in the population remained below 2.0 per cent. The MOH reported 31 898 cases of HIV/AIDS between 1982 and 2013. Approximately 75.0 per cent fall within the 20-49 year old age group and 9 056 (28.4 per cent) are known to be deceased. Achievements and advances in the care of people living with HIV/AIDS included: the integration of

HIV/AIDS services of the national HIV/AIDS programme into the National Family Planning Board; the development of the draft National Integrated Sexual Health Strategic Plan; establishment of a National HIV/AIDS-Discrimination Reporting and Redress System; development of the National HIV Workplace Policy; and the commissioning of several research to clarify issues for evidence based practice. A steering committee was commissioned for the revision of the HIV/AIDS Policy to examine the achievement of the HIV/AIDS response, indicate new and emerging care treatment and support of people living with HIV (PLHIV), and to make recommendations for 2015 and beyond in the prevention of new HIV/AIDS infections and the treatment and care of PLHIV. The core areas identified in the Policy are:

- Prevention of HIV infections – this indicator addresses behaviour change, HIV and SRH interventions in vulnerable groups including key populations and condom use
- Treatment Care and Support – proposed strategies surrounds antiretroviral therapy, management of STIs, elimination of mother to child transmission
- Enabling Environment and Human Rights (EEHR) – protection of the rights of PLHIV, PWD, key populations at risk and workplace while focus will also be given to Policy and Legislative Framework
- Mitigation of the Social and Economic Impacts of HIV and AIDS – focuses on the impact mitigation of policy statements concerning social protection, gender equality and equity, protection of orphans, vulnerable children and the aged, and emotional and psychological support
- Implementation of the Plan – includes programmatic coordination of and management of the policy
- Resource Mobilization, management and monitoring – monitoring and evaluation of the implementation benchmarks.

Given the tight fiscal space, the budgetary allocations from the GOJ budget is unable to adequately implement the national HIV response. Important considerations were therefore given to sustainable funding of the response. With the Global Fund Grant and USAID/PEPFAR funds ending in 2015, there have been collaborative efforts with the Jamaica Country Coordinating Mechanism (JCCM) in preparing the next proposal for a new funding agreement with the Global Fund for fighting Malaria, Tuberculosis and HIV. Under this new agreement, the MOH will remain the principal recipient

25. Delivery of an infant through surgical incision in the mothers abdomen and uterus.

26. 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.

of the fund and main areas of focus will be on key populations, treatment care and support. Achievements under the PEPFAR Caribbean Regional Framework were improved national and community level coordination across sectors; improved data availability and use; and strengthening institutional, governmental and civil society capacity.

Prevention strategies have proven successful in the most at risk populations (MARPs) in the continued fight against HIV/AIDS. Targeted scaled-up interventions for this group included: delivery of prevention and voluntary counselling and testing services to inmates (1 287); female sex workers (8 383); men who have sex with men (MSM) {2 994}; and homeless drug users (283). There was also continued partnership with the CDA in providing interventions for the Homestead Place of Safety and training of health care workers in public health facilities. In order to improve treatment and prevention activities among the MARPs a 3rd Generation Surveillance of Commercial Sex Workers, Female Patrons and Workers of Sites where Persons Meet Sex Partners or participate in Sexual Activities in Jamaica was initiated.

Efforts were made to strengthen the strategies in the component of EEHR. Focus was placed on advocating for enactment and amendment of laws and policies through continued stakeholder involvement and sensitization of Faith Based-Organizations (FBOs), the police and Justices of the Peace on human rights approach to the service delivery, stigma and discrimination; and the development of the Positive, Health, Dignity and Prevention (PHDP) Curriculum for People Living with HIV/AIDS (PLHIV) leaders. The activities of the national HIV response were being tracked by the Monitoring and Evaluation Unit through which the Global AIDS Response Progress Report to UNAIDS 2014 was submitted. The report assessed the country's progress made against the target of the 2011 UN Political Declaration on HIV and AIDS and the MDGs.

Health Promotion and Education

Through the Health Promotion and Protection Division, the MOH fulfilled its mandate of the country strategic community based programme in the prevention of diseases. The main focus for the RHAs was on community mobilization in response to outbreaks and NCD promotions at corporate wellness and fitness activities, and building alliances in health promotions with key stakeholders including schools. Activities were however limited due to the redirection of funds to the Chik V outbreak and the impending threat of Ebola. Several interventions based on the Chik V outbreak were done in sessions with communities. Materials were distributed at health facilities and in schools throughout the regions. Over 10 000 participants were reached through these activities.

Jamaica is party to the WHO Framework Convention on Tobacco Control through the passage of the Public Health (Tobacco Control) Regulation since July 2013²⁷. To support the implementation of the regulations, a social marketing campaign was initiated which included tobacco control; capacity building and sensitization workshops with health professionals; and training of regional environmental health officers, health promotions officers and chronic disease coordinators. With the limited funding available, activities included: two one-day Regional Tobacco Cessation training; six sessions held by the National Council for Drug Abuse; a health forum with Larvicidal²⁸ workers in the SERHA; training of four health education officers as drug prevention specialists; and tobacco control regulation education through PTA meetings in some regions. In celebration of World No Tobacco Day, a Poster and DJ competition was held in 42 schools across the island.

The MOH continued to support the health promotion aspect of the Community Renewal Programme (CRP) in fulfilling its mandate of more habitable environments, better sanitation and better public and individual infrastructure. The CRP in partnership with the MOH, through the KSA Health Department, conducted four community health fairs, in the communities of Fletchers Land, Franklyn Town, Parade Gardens, and Tivoli Gardens. Health checks were given to over 575 community members with approximately 662 referrals for abnormal findings from blood pressure and blood sugar, eye screening, cholesterol and haemoglobin tests.

Chronic Diseases

Jamaica's epidemiological profile is characteristic of high and increasing levels of NCDs and continues to have widescale impact on mortality and morbidity. The *JSLC 2012* indicated that over 30.0 per cent of persons with chronic diseases already experienced comorbidities which have increased the burden of health care at both the primary and secondary levels as well pharmacies services. The four underlying risk factors—tobacco use, unhealthy diets, physical inactivity and the harmful use of alcohol are largely responsible for the development of NCDs²⁹. The specific investment by the MOH in primary health care renewal is a strategic move to combat these diseases. During the year, hypertension accounted for the highest number of curative visits 158 976 (27.8 per cent) relative to 135 347 in 2012 (Table 23.7). Treatment and care continues to be guided by the MOH five-year multi-sectoral National Strategic and Action Plan for the Prevention and Control of Non-Communicable Diseases (2013–2018). Inadequate funding has affected achievement of the targets of the priorities in the Strategic Plan—a communications plan and implementation of the chronic care model/NCD treatment protocols. Health and promotion strategies, however, are

27. <http://www.tobaccocontrollaws.org/legislation/country/jamaica/summary>

28. Category of health workers that does fumigation for the termination of larvae.

29. <http://www.commonwealthhealth.org/americas/jamaica/>

embedded into the Service Level Agreements for all RHAs especially in primary care that reaches individuals at the community level. Selected clinics across the regions have invested in specific days for treatment care and health promotions for clients with hypertension and diabetes.

Cancer Care

Cancer is the 4th leading cause of death in Jamaica. The estimated incidence rate for cervical and breast cancer was 31.2 and 12.1 per 100 000 population, respectively. The National Strategy and Action Plan for the Prevention and Control of Cancer are implemented under the direction of the National Cancer Technical Working Group. In an effort to address the cancer burden more effectively, the MOH commenced roll-out of the National Cancer Registry in March 2013; since then, three of the RHAs (SERHA, NERHA, SRHA)³⁰ have collected data on cancers. The registry contains information on the types, extent, location, incidence and prevalence of the cancer and biographical data. In the primary care facilities pap smear³¹ screening among women in childbearing age yielded 28 210, a total of 64 668 women were screened for breast cancer and 1 275 men were screened for prostate cancer. A project for the introduction of Visual Inspection with Acetic Acid (VIAA) screening services began with some 405 women screened. Training was conducted with four cytotechnicians from the MOH and 15 workers from the Manchester Health Department which included demonstration of cervical cancer screening using VIAA. One Pathologist was also contracted to deliver services at the National Public Health Laboratory.

Oral/Dental Health

According to WHO, 90.0 per cent of the world's population will suffer from an oral disease in their lifetime. Oral health services were offered to 135 583 persons during 2014 and 76 211 females accessed these services. The 2014 World Oral Health Day focused on "Celebrating Healthy Smiles" reinforcing the fact that having a healthy mouth is a reason to celebrate. Jamaica has long established dental care within primary health care and some secondary care public health facilities. Efforts were made to modernize and standardize the guidelines for establishing and maintaining a modern Oral Health Care facility in primary health care setting. Through this initiative, a standards document for dental facilities was drafted.

Key strategies to improve oral health services over the period included: capacity building for health professionals; monitoring exercises for existing Oral Health Standards; provision of oral health care to the special needs population; and establishment of a National Oral Health System (OHIS). Another oral health initiative undertaken was the establishment of a school based oral health service. A gap analysis of the initiative was performed and the results led to

the establishment of a partnership between two companies to implement within schools.

Jamaica became the first country outside the United States to become a member of the American Board of Dental Examiners. This will open the opportunity for locally trained Doctors of Medical Dentistry to meet the highest standards of international best practices.

Nutrition

A major undertaking during the year was the finalization of the Jamaican Food-Based Dietary Guidelines to improve the nutritional status by promoting healthy eating practices. During this process, two food recall questionnaires were fielded among 240 households identified by STATIN through the efforts of the Nutrition Task Force. Based on the household trials the representative diagram of the Jamaican Food-Based Dietary Guideline was revised.

Further efforts to improve the nutritional status of the population were achieved through the finalization and approval of the National Infant and Young Child Feeding Policy. The objectives of the Policy are to:

- increase access to breast feeding support in communities and the workplace
- achieve Baby Friendly Hospital Initiative (BHFI) status in all institutions providing maternity and child Health services
- establish a sustainable mechanism for accurate timely and comprehensive collection and dissemination of data on infant and young child feeding and related indicators to influence policy and programme development
- build capacity within all relevant agencies and at different levels of the health system and community for the promotion, protection and support of infant and young child feeding practices
- develop and implement sustainable public education initiatives for the promotion and support of optimal infant and young child feeding practices.

Priority areas in achieving these objectives included:

- advocacy and legislation – to promote and strengthen capacity of institutions in the areas of advocacy legislation and regulations to advance the infant and young child feeding agenda
- training – an institutional level in health and education sectors as well as public and private sectors and for women of child bearing age, care givers, and pregnant and lactating women

30. WRHA shortage of staff influenced the collection of data for the Cancer Registry in this region.

31. The Papanicolaou test (abbreviated as Pap Smear) is a method of cervical screening used to detect potentially pre-cancerous and cancerous cells.

- health care delivery – seek to scale up the BFHI and improve capacity of the health sector to drive services in antenatal care, intra-partum, immediate postpartum and neonatal care, care in special circumstances such as breast-feeding in the context of HIV infection, low birth weight and premature babies, multiple births and special medical conditions
- public information education and communication – effective public education and information programme designed and implemented to encourage behaviour change
- monitoring, evaluation and research – establishment of framework including national surveys on nutrition status and feeding practices of infants and young children.

The PIOJ, MOH, MOAF, MOE³² and Food and Agriculture Organization of the United Nations (FAO) collaboration resulted in successful completion of the School Feeding course on “Development of Sustainable Programmes Taking the Brazilian Experience as Reference”. Over 40 decision makers across different MDAs and the production of a document that describes the current national programme and recommendations for improvement. The programme is in support of the implementation of the National Food and Nutrition Security Policy.

Environmental Health

Funding challenges greatly impacted the achievement of the objectives for environmental health largely due to the Chik V outbreak and the extensive activities that had to be executed in the management of these vector-borne diseases. To reduce and control adult population of vectors, efforts were made to monitor the *Aedes aegypti* Larval Indices in all RHAs; obtain additional vector control supplies and equipment; train vector control staff to support vector control; and inspect premises for breeding sites. All vessels and aircrafts were monitored at the ports of entry and findings were presented to the Port Authority of Jamaica. This was done in tandem with other activities including training in preparation for suspected cases of the deadly Ebola Virus.

The MOH Waste Management Unit piloted a database for management system in advancing its administration system. Two capacity building regional workshops were completed for healthcare workers in proper waste management procedures.

The Epidemiological Research Unit maintained and strengthened the Geographic Information System (GIS)

for data analysis. The system was used to produce maps to meet health data needs including mapping requests for the incidence of Chik V cases across the island.

The National Health Research Conference is a primary forum to highlight the research of public sector workers, but also includes research from stakeholders. The Conference was held on November 27–28, 2014 under the theme, *Healthy Individual, Healthy Community, Healthy Nation* and covering the areas of chronic non-communicable diseases, nutrition and community health. These areas fall under the eight priorities of the Caribbean Cooperation in Health, Phase III, an initiative approved by the CARICOM Heads of Government³³. The year marked the 5th anniversary of the Conference, and there was special recognition of consistent attendees. Fifteen oral presentations, eight poster presentations, two special presentations and a panel discussion were made over the two days. Approximately 213 individuals attended.

SUPPORT CARE SERVICES

Pharmacies

The GOJ continues to deliver essential medicines to clients through pharmaceutical services in public health centres and hospitals. Each year, there are additions of new ingredients to the Vital Essential and Necessary drug list of medicines to meet the health needs of the population, over 35 changes were made to the NHF Programme as a result of the addition of new labels of existing active pharmaceutical ingredients. Due to the overwhelming demand for pharmacy services in the public health facilities, there were several challenges—long waiting time for prescriptions, staff shortages in government pharmacies, and increased number of unavailable supplies. The NHF rolled out new pharmacy software in public sector, after which all public sector pharmacies will be able to use a swipe card at facilities. The software has been rolled out at all regional hospitals, Spanish Town Hospital and the three recently transferred hospital pharmacies. The transferred facilities include pharmacies at the Bustamante Hospital for Children, Percy Junor and Port Maria Hospitals. The remaining pharmacies are still governed by the MOH.

Provisional data from the MOH showed that 827 501 pharmacy items were prescribed of which 546 376 (66.0 per cent) were dispensed to 280 086 patients³⁴ who accessed pharmacy services in public health centres during January–September 2014. Of the items prescribed, 26.6 per cent was reportedly out of stock. The NERHA recorded the largest number of patient visits, however, the SRHA reported the largest number of items prescribed, dispensed and out of stock (Table 23.9).

32. Planning Institute of Jamaica (PIOJ), Ministry of Health (MOH), Ministry of Agriculture and Fisheries (MOAF), Ministry of Education (MOE).

33. Caribbean Cooperation in Health Phase III (CCH III). Regional Health Framework 2010-2015. Investing in Health for Sustainable Development. CARICOM. http://www.caricom.org/jsp/community_organs/health/cch_iii_summary.pdf

34. Data were available for all parishes except St. Thomas, Hanover and Westmoreland.

TABLE 23.9
PHARMACY SERVICES AT PUBLIC HEALTH CENTRES
BY REGION AND PARISH, 2014

REGION/PARISH	Number of Patients	Items Prescribed	Items Dispensed	No. of Items Out of Stock
TOTAL JAMAICA	280 086	827,501	546 376	220 066
SOUTH EAST	81 806	290 905	190 641	99 074
Kingston & St. Andrew	71 147	253 026	166 600	84 265
St. Thomas ^a	0	0	0	0
St. Catherine	10 659	37 879	24 041	14 809
NORTH EAST	116 501	227 959	146 957	65 318
Portland	12 051	53 444	40 946	7 949
St. Mary	14 935	48 897	35 910	11 558
St. Ann	89 515	125 618	70 101	45 811
WESTERN	33 881	121 782	81 215	11 945
Trelawny	10 269	38 288	25 621	11 837
St. James	23 612	83 494	55 594	108
Hanover ^a	0	0	0	0
Westmoreland ^a	0	0	0	0
SOUTHERN	47 898	186 855	127 563	43 729
St. Elizabeth	2 051	8 323	6 320	146
Manchester	28 294	111 761	76 780	23 081
Clarendon	17 553	66 771	44 463	20 502

Note: Data is provisional and was only available for the period January – June, 2014

a - Data unavailable for these parishes

Source: Ministry of Health

During the period January–September 2014, a total of 525 762 patients who were admitted to hospital (in-patient cases) or visited clinics (out-patient cases) had access to the pharmaceutical services, relative to 635 087 in 2013. The total number of items prescribed from public hospital pharmacies was 2 099 262, of which 73.6 per cent was prescribed to out-patients (Table 23.10). Approximately 69.1 per cent of the prescribed items was dispensed, the majority was in the SRHA (32.9 per cent) and the WRHA (28.8 per cent) {see Table 23.10}³⁵. Compared with the corresponding period in 2013, the SERHA dispensed the majority of drugs (34.2 per cent) followed by the WRHA (25.0 per cent).

Biomedical Equipment

It is important to ensure optimum quality and capacity of biomedical equipment within the public sector. Throughout the year, repairs and replacement were undertaken through budgetary allocations and financial support from IDPs.

Among these were:

- replacement of obsolete radiological equipment in WRHA and NERHA

- purchase of a 400 pound washing machine for the Cornwall Regional Hospital
- procurement of an ambulance for the Alexandria Community Hospital
- Five microscopes procured and commissioned for processing histopathology and cytology samples at the National Public Health Laboratory.

PARTNERS IN HEALTH CARE

RISE³⁶ Life Management Services

RISE continued implementation of its vision of helping to create a society where vulnerable groups such as young people are empowered to make healthy life choices in a supportive environment. Several projects and services were successful throughout the year including school-based, health, vocational, social and entrepreneurial projects. A total of 22 094 individuals benefited from interventions. Awareness on sexual abuse among children and training in life and social skills were made available for over 462 girls and boys. A

35. Data for the period were not comparable statistics from the MOH was only available for the period January to August 2012.

36. Reaching Individuals Through Skills and Education

TABLE 23.10
PHARMACY SERVICES AT PUBLIC HOSPITALS
BY REGION, 2014

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	554 498	1 544 764	438 502	1 011 992	159 309	366 453
South East	189 071	252 132	144 293	182 394	55 422	65 760
North East	91 274	299 657	74 124	153 032	26 724	60 209
Western	151 826	382 372	130 014	288 010	41 192	90 815
Southern	122 327	610 603	90 071	388 556	35 971	149 669

Note: Data provisional; available for the period January – September, 2014

Source: Ministry of Health

RISE/UNICEF funded collaboration implemented the Ropes Challenge Course, a six-month intervention for the training of at risk youths and youth leaders in personal development, life and social skills. A human rights awareness programme was jointly implemented with the EU and British Council. Through this programme, the concepts of democracy was reinforced among youths, civil society organizations and NGOs to encourage systematic change in fostering respect and equality in Jamaica. Other youth-focused programmes included the Jamaica National Youth Leadership programme, out-patient substance use disorders treatment programme, responsible gaming programme, and the employee assistance programme. These programmes assisted young people through drug testing, counselling, treatment and prevention services with gambling and responsible gambling training, and provided support services to employees of companies referred for assistance. A benchmark programme is the MOH Global Fund HIV awareness programme which is a one-year community-based intervention targeting most at risk youths. The intervention included specific actions to improve sexual reproductive health and psychosocial services and increase condom use, HIV testing, counselling and awareness building among key populations of seven targeted innercity communities.

RISE continued to be responsive to the needs of Jamaicans in the prevention and treatment of addictive disorders by expanding its services offered islandwide to guidance and peer counsellors, gaming establishments and administering drug testing. The organization faced funding challenges which impacted staff retention and sustainability of successful community interventions.

National Council on Drug Abuse (NCDA)

The implementation of treatment and rehabilitative programmes, training sessions and workshops and special projects were the primary initiatives over the period. Step Up indicated programmes targetted 12–18 year old high school students and the READ Plus Universal programmes

targetted teens in second chance institutions. Through 12 training sessions and workshops, 333 counsellors, volunteer’s school groups, clubs and other stakeholders were reached in different schools and communities. The messages of the NCDA were also spread through the media as they doubled the target with 33 media opportunities across communication networks. Treatment and evaluation was a major focus of the council as it was most effective in reaching the majority of clients. Over 1 500 individual groups and families benefited from counselling sessions and 122 persons who successfully completed the Drug Court Programme was reintegrated into society.

The “Tek it to Dem” programme is a treatment initiative targeting individuals within the homeless population by providing testing for HIV/AIDS and substance abuse as well as transporting individuals for medical treatment. For the period, 166 persons were tested for HIV/AIDS and 129 for substances. Other activities under the programme included a health fair that benefited hundreds of the homeless, focus group sessions, and capacity-building workshops for caregivers, condom distribution among the homeless (24 269), and distribution of care packages.

Challenges encountered included inadequate stakeholder support and human resources. This capacity could help in expansion of the underage drinking initiative, wider social media campaigns, and strengthen public education on marijuana and enhance tobacco cessation to the general population.

Pan American Health Organization (PAHO)

Areas of focus under the technical cooperation were informed by the PAHO Strategic Plan 2014–2019, *Vision 2030 Jamaica’s* goal for a healthy and stable population and the Health Agendas of the Americas. A reported 53.1 per cent (58.4 million) of the allocated funds were disbursed to support programmes, management and operational costs. The areas of focus technical cooperation were informed by the PAHO Strategic Plan 2014–2015, the *Vision 2030 Jamaica’s* goal of

a healthy and stable Population, Ministry of Health Strategic Business Plan, 2012–2015 and the Health Agenda of the Americas. The Chik V outbreak and the Ebola Preparedness activities diverted resources including human resources from the technical areas of cooperation and implementation of some activities were delayed as a result. Under the strategic areas of focus the following projects were completed:

- Preparedness, surveillance and response – support to the MOH in the Chik V response and Ebola preparedness through reviews (protocols strategic plans, and guidelines), procurement of equipment including protective clothing, printing of health alert cards, communication and health education
- Communicable Diseases – support to the MOH in its elimination of Mother to child transmission (eMTCT) of HIV and Congenital Syphilis, through the provision of prophylactic antiretroviral treatment to at least 80.0 per cent of the estimated HIV positive pregnant women. Continued support was also given for the programme for the prevention and control of Tuberculosis (TB) as well as activities for World TB Day.
- Vaccine Preventable Diseases – key areas of focus were on maintenance of eradication of vaccine preventable diseases through support in facilitating the procurement of vaccines and other supplies for the immunization program. Support was also given for capacity building exercises through the training of 153 health workers from all the RHAs, printing of 66 000 brochures on vaccine myths, community education programmes and other clinical sessions pertaining to vaccine as well as international conferences on management and supply of vaccines.
- Non-Communicable Diseases – initiatives for the implementation of the Tobacco Control Regulations included PAHO/MOH collaboration in the hosting of a mission to conduct a needs assessment for the implementation of the WHO Framework Convention on Tobacco Control and for the activities based on the post needs assessment. Support was also provided for the implementation of the national cancer registry in the four RHAs, and procurement of a machine for sickle cell screening through a Brazil/MOH/PAHO agreement.

OUTLOOK

In an effort to improve efficiency and expand coverage, collaborative efforts with the MOH in consultation with

pharmaceutical suppliers is seeking to streamline the NHF and Jamaica Drugs for the Elderly Programmes (JADEP) in areas where there are coverage for similar products. An internal review will be done of both programmes and the recommendations presented to the National Health Fund's board for consideration.

The WHO states that “UHC is to ensure all people have access to needed services (prevention, promotion, curative, rehabilitation, and palliative care) with sufficient quality to be effective and without exposing individuals to financial hardship.” In the steps towards achieving Universal Health Coverage, the MOH and PAHO/WHO is collaborating on positioning UHC as a critical health sector goal in the Post-2015 Development Agenda. To this end, the 2015 activities will include high level multi-sectoral dialogue on UHC and development of a strategic road map (or mechanism) to advance towards achieving UHC in Jamaica.

The MOH is seeking to have an established research agenda to strengthen health research systems and research governance, support the prioritization of national research for health, and promote the generation of quality health research in Jamaica through the Essential National Health Research Committee (ENHRC). The National Health Research Agenda should be developed by 2015/2016 as well as the formulation of a National Policy on Research for Health.

The Ministry is proposing to re-design and re-distribute the existing Primary Health Care facilities into four categories of health centres to replace the existing five categories. The proposed categories are Parish, Comprehensive, District and Community Health Centres. The centres will be categorized based on the epidemiological profile of communities including, population size and density, disease burden, transportation and the availability of other services such as hospitals. This will result in a realignment of current geographic distribution from the 1960s to one which matches the current population distribution and growth trends.

The Chik V research working group will advance research in understanding the clinical history of the disease and the social impact and implications on Jamaicans. Organised teams within the working group will explore a number of research questions including the determination of the social and economic impacts of the disease. Aspects to be explored will include absenteeism from work and school, loss of income, social and economic impacts.

In the area of food and nutrition, the MOH will seek to finalize, launch and disseminate the Food-Based Dietary Guidelines for Jamaica, which will be used in promoting good nutrition and healthy living. ■

NATIONAL SECURITY AND JUSTICE

INTRODUCTION

In keeping with Goal 2 of Vision 2030 Jamaica — “The Jamaican Society is secure, cohesive and just” — there were a number of activities undertaken in the security and justice sectors. This resulted in a continued reduction in the total number of reported Category 1 Crimes¹. The strength of the police force was boosted with the merger of the Island Special Constabulary Force into the Jamaica Constabulary Force (JCF). The National Strategic Anti-Gang Unit was established in the Organized Crime Investigation Division, while the Major Organized Crime Task Force and the JCF’s Anti-Corruption Branch were merged to form the Major Organized Crime and Anti-Corruption Agency. The National Police College of Jamaica was established after merging existing training units within the JCF.

The revised National Security Policy was finalised after being presented in the House of Parliament and the Senate. Implementation of the National Crime Prevention and Community Safety Strategy continued with the Unite for Change Movement entering into strategic partnerships with a number of stakeholders. The funding agreement for the third phase of the Citizens’ Security and Justice Programme (CSJP III) which is a major social intervention initiative targeting communities with high levels of violence was signed. The programme will be implemented in 50 pre-selected communities across eight parishes.

The well-being of inmates and wards at the island’s correctional facilities was further enhanced with the implementation of the Suicide and Self Harm Plan. Additionally, the reclassification and transfer exercise aimed at reducing the population in high security correctional facilities continued. As part of the rehabilitation process, inmates and wards continued to receive training in skill and personal development areas.

Work commenced regarding the establishment of a human rights institute, while implementation of the Justice Undertakings for Social Transformation (JUST) Programme

continued. Construction of Justice Square was completed while renovations were made to a number of courthouses islandwide. Several pieces of legislation were also enacted or amended.

FINANCING

Budget allocation for the Ministry of National Security (MNS) and its departments and agencies² for fiscal year (FY) 2014/15 was approximately \$50.3 billion, which represented 9.3 per cent of the Government of Jamaica (GOJ) budget. This was the third largest allocation after the Ministry of Finance and Planning, and the Ministry of Education, and just over \$0.7 billion less than the allotment for the previous year (Table 24.1a).

The MNS budget is shared among 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 \$30.3 billion of the total budget; followed by the JDF with approximately \$12.4 billion. The recurrent allocation amounted to 93.6 per cent of the total budget for the MNS. Total Capital A allocation was approximately \$2.2 billion (less appropriation in aid) and was spent primarily on, constructing and repairing physical infrastructure, and purchasing equipment.

Official Development Assistance (Capital B Budget) for the ministry was just over \$1.0 billion and the allocation was for a number of projects including:

- Citizens’ Security and Justice Project (CSJP) III, funded by IDB/DFID/DFATD/GOJ³
- Justice, Security, Accountability and Transparency (JSAT) Project, funded by the EU⁴
- Rehabilitation and Reintegration of Local Offenders and Deported Persons Programme, funded by the British Foreign and Commonwealth Office
- JCF Reform Programme, funded by DFID (Figure 24A).

1. Category 1 crimes is the classification of crimes that are considered serious and that are, at times, coupled with acts of violence. The Category 1 crime classification is further subdivided into two groups: serious and violent crimes, and acquisitory crimes.
2. Does not include the Passport, Immigration and Citizenship Authority.
3. Inter-American Development Bank/ Department for International Development/ Department for Foreign Trade and Development/Government of Jamaica
4. European Union

TABLE 24.1
MINISTRY OF NATIONAL SECURITY
RECURRENT AND CAPITAL BUDGET BY FUNCTION
2013/14–2014/15
\$'000

RECURRENT	REVISED ESTIMATE 2013/14	ESTIMATE 2014/15
Ministry of National Security	1 395 947	1 505 960
Jamaica Defence Force	12 197 277	12 035 269
Jamaica Constabulary Force	29 571 019	28 642 246
Department of Correctional Services	4 937 975	4 882 859
SUBTOTAL	48 102 218	47 066 334
CAPITAL A		
Jamaica Defence Force	864 179	1 341 000
Jamaica Constabulary Force	1 050 383	631 245
Department of Correctional Services	221 310	200 000
SUBTOTAL	1 592 172	2 172 245
CAPITAL B		
Jamaica Constabulary Force	1 228 868	1 025 357
Department of Correctional Services	51 807	14 000
Other Social and Community Services	49 018	0
SUBTOTAL	1 329 693	1 039 357
TOTAL	51 024 083^a	50 277 936^a

a - Less Appropriation in Aid

Source: Estimates of Expenditure - for fiscal year ending March 31, 2015

Budget allocation for the Ministry of Justice (MOJ) for FY 2014/15 was approximately \$5.5 billion; which was 1.0 per cent of the total GOJ budget and over \$0.8 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 \$1.8 billion, followed by the Resident Magistrates' Courts (RM Courts), Supreme Court and the Attorney General's chambers. The recurrent allocation was 84.8 per cent of the total budget. The

TABLE 24.2
MINISTRY OF JUSTICE
RECURRENT AND CAPITAL BUDGET BY FUNCTION
2013/14–2014/15
\$'000

RECURRENT	REVISED ESTIMATE 2013/14	ESTIMATE 2014/15
Ministry of Justice	897 832	939 416
Court of Appeal	150 286	173 138
Director of Public Prosecution	268 000	270 419
Family Court	170 705	186 716
Resident Magistrates' Courts	1 079 340	1 134 577
Revenue Court	2 763	2 621
Supreme Court	767 584	862 015
Administrator General	116 468 ^a	179 000
Attorney General	467 598	529 375
Trustee in Bankruptcy	40 847	43 647
Office of Parliamentary Counsel	84 861	80 708
Legal Reform Department	46 598	47 537
Court Management Services	214 410	203 407
SUBTOTAL	4 307 292	4 652 576
CAPITAL A		
Ministry of Justice: Public Order & Safety Services	231 675	445 000
SUBTOTAL	121 675^a	445 000
CAPITAL B		
Ministry of Justice: Public Order & Safety Services	201 406	386 903
SUBTOTAL	201 406	386 903
TOTAL	4 630 373	5 484 479

a - Less appropriation in Aid

Source: Estimates of Expenditure - for fiscal year ending March 31, 2015

Capital A allocation of the MOJ was primarily for completing construction of Justice Square and refurbishing of the Hagley Park Road Complex to house the MOJ. The approximately

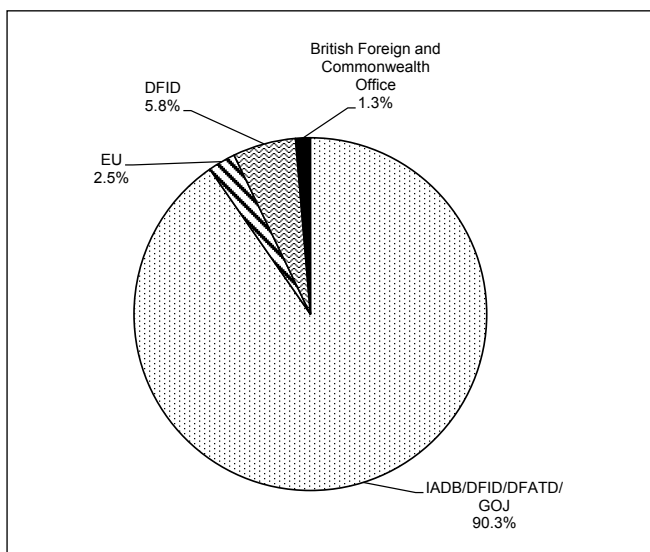


FIGURE 24A: ODA ALLOCATION FOR THE MNS, 2014

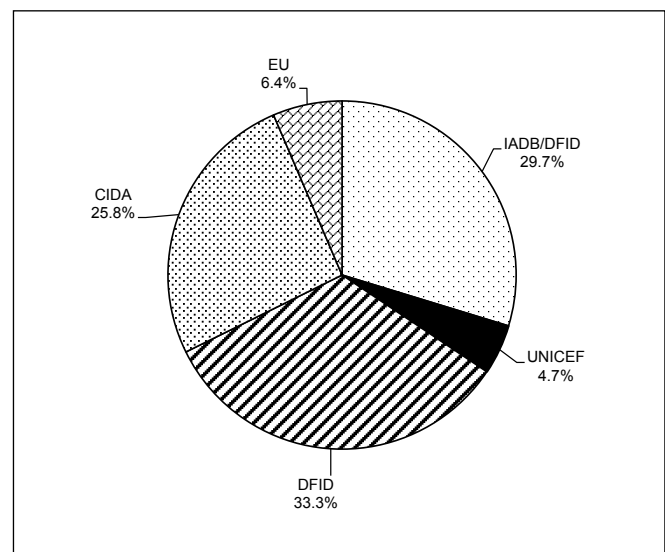


FIGURE 24B: ODA ALLOCATION FOR THE MOJ, 2014

TABLE 24.3
NUMBER AND TYPE OF CATEGORY 1 CRIME REPORTED AND CLEARED UP, 2012–2014

OFFENCE	2012 ^r		2013 ^r		2014 ^p		Per cent change in reported crime 2013/2014	Per cent change in crimes cleared up 2013/2014
	Reported	Cleared Up	Reported	Cleared Up	Reported	Cleared Up		
A. Serious and Violent Crimes - Category 1								
Murder	1 099	424	1 200	492	1 005	404	-16.3	-17.9
Shooting	1 247	445	1 241	512	1 095	361	-11.8	-29.5
Rape	955	382	841	396	651	342	-22.6	-13.6
Aggravated Assault	933	590	810	575	670	490	-17.3	-14.8
TOTAL	4 234	1 841	4 092	1 975	3 421	1 597	-16.4	-19.1
B. Acquisitory Crimes - Category 1								
Robbery	2 771	505	2 672	473	2 234	470	-16.4	-0.6
Break-in	3 234	490	2 534	535	2 460	515	-2.9	-3.7
Larceny from person, dwelling, motor vehicle	759	187	532	175	442	163	-16.9	-6.9
TOTAL	6 764	1 182	5 738	1 183	5 136	1 148	-10.5	-3.0
GRAND TOTAL	10 998	3 023	9 830	3 158	8 557	2 745	-13.0	-13.1

a - Aggravated Assault entails Felonious Wounding, Assault Occasioning Grievous Bodily Harm and Wounding with Intent that does not involve a gun
r - revised

p - preliminary

Note: Data on all crimes were not available at the time of publication

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

TABLE 24.4
CATEGORY 1 CRIME BY PARISH, 2014

Parish	Murder	Shooting	Rape	Aggravated Assault	Robbery	Break-in	Larceny	Total
Kingston	151	204	52	53	251	150	62	923
St. Andrew	138	173	105	85	537	424	74	1536
St. Catherine	204	206	159	55	548	384	37	1593
St. James	159	141	48	39	129	81	23	620
Trelawny	22	21	18	28	37	106	13	245
Westmoreland	51	101	37	44	74	97	8	412
Hanover	39	30	16	20	29	69	7	210
St. Mary	25	9	27	43	50	93	15	262
St. Ann	38	33	22	51	121	190	48	503
Portland	7	4	21	46	19	85	15	197
Manchester	41	29	24	97	177	402	97	867
Clarendon	97	96	58	45	166	168	22	652
St. Elizabeth	21	27	37	39	67	123	13	327
St. Thomas	12	21	27	25	29	88	8	210
Total	1 005	1 095	651	670	2 234	2 460	442	8 557

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

\$0.4 billion in Official Development Assistance (Capital Budget) was for funding the justice component of the CSJP III, the JSAT project and the following:

– National Child Diversion Programme, funded by UNICEF

- Justice Undertakings for Social Transformation, funded by DFTAD
- 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

Category 1 Crimes

The total number of Category 1 crimes reported declined from 9 830 in 2013 to 8 557 (Table 24.3). There was a reduction in the reported incidence of all crimes except rape and aggravated assault. The Category 1 crime rate declined from 351 per 100 000 population in the previous year to 314 per 100 000. 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 2 745 cases were cleared up by the end of the year. The parish of Portland had the highest clear up rate (56.3 per cent) while St. Catherine had the lowest (23.6 per cent) {See Box 2}.

BOX 1: CATEGORY 1 CRIME RATE BY PARISH, 2014

PARISH	RATE PER 100 000
Manchester	453
Kingston and St. Andrew	368
St. James	335
Trelawny	323
St. Catherine	306
Hanover	300
St. Ann	289
Westmoreland	284
Clarendon	264
Portland	239
St. Mary	229
St. Thomas	222
St. Elizabeth	216

BOX 2: CATEGORY 1 CRIMES COMMITTED AND CLEARED UP BY PARISH, 2014

PARISH	NUMBER OF CATEGORY 1 CRIMES COMMITTED	NUMBER OF CATEGORY 1 CRIMES CLEARED UP	PER CENT CLEARED UP
Kingston	923	335	36.3
St. Andrew	1 536	426	27.7
St. Catherine	1 593	376	23.6
St. James	620	244	39.4
Trelawny	245	95	38.8
Westmoreland	412	150	36.4
Hanover	210	60	28.6
St. Mary	262	114	43.5
St. Ann	503	199	39.6
Portland	197	111	56.3
Manchester	867	222	25.6
Clarendon	652	214	32.8
St. Elizabeth	327	91	27.8
St. Thomas	210	108	51.4
Grand Total	8 557	2 745	32.1

A total of 22 525 persons were arrested during the year, 5 435 fewer than in 2013. Of this number, 3 181 (96.6 per cent male) were for Category 1 crimes, with 48.0 per cent of those arrested in the 15–24 age group (Table 24.5). Some 49.1 per cent of 108 females arrested was for aggravated assault. There were 9 994 victims (60.0 per cent male) of Category 1 crimes. Approximately 73.0 per cent of victims were between 18 and 54 years of age, 22.6 per cent between 15 and 24 years of age, 7.9 per cent between 0 and 17 years of age, and 5.1 per cent 65 years and over (Table 24.6). There were 96 victims (59 males) of Category 1 crimes that were identified as arising from domestic violence.

Murder

The number of reported murders declined by 16.3 per cent to 1 005, a decline in the murder rate from 44 per 100 000 population in 2013 to 37 per 100 000 population. Two police officers were among those killed. Compared with 2013, the number of females murdered declined by 22.5 per cent to 100. There was also a decline in the number of children killed, from 70 in 2013 to 44. Firearms were used to commit 71.0 per cent of all murders (Figure 24C). “Gang-related activities” was cited as the primary motive for 59.7 per cent of reported murders followed by “Criminal (not gang related)” with 32.4 per cent (Figure 24D). There were 52 domestic related murders (34 males), 24 fewer than in the previous year. As it relates to the locale in which these murders occurred, the trend continued with the parishes of St. Catherine, St. James, Kingston, St. Andrew and Clarendon recording the most murders with 204, 159, 151, 138 and 97 murders, respectively,

TABLE 24.5
AGE GROUP AND SEX OF PERSONS ARRESTED FOR CATEGORY 1 CRIMES, 2014

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	
12-14	4	0	0	0	10	0	29	2	5	0	17	0	17	2	82	4	86
15-17	24	1	19	0	67	1	88	7	21	0	46	0	40	5	305	14	319
18-24	205	2	179	0	272	3	230	8	59	5	109	0	124	12	1 178	30	1 208
25-34	161	6	138	1	174	0	148	4	39	2	112	0	130	17	902	30	932
35-44	39	0	46	0	55	1	66	6	17	2	44	0	96	9	363	18	381
45-54	14	0	12	0	15	0	46	2	8	2	31	0	52	4	178	8	186
55-64	7	0	3	0	2	0	8	0	3	0	9	0	18	1	50	1	51
65& Over	2	0	0	0	0	0	3	0	2	0	2	0	5	3	14	3	17
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
Total	456	9	397	1	595	5	618	29	154	11	370	0	483	53	3 073	108	3 181

a - Arrest may not relate to crimes committed in 2014

Source: Jamaica Constabulary Force Statistics and Information Management Unit

TABLE 24.6
AGE GROUP AND SEX OF VICTIMS OF CATEGORY 1 CRIMES, 2014

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	
0-9	3	3	4	4	0	0	0	1	0	0	24	1	1	8	33	41
10-14	8	3	3	3	27	27	1	5	4	3	184	12	12	55	237	292
15-17	27	0	44	11	80	66	6	19	5	12	139	31	12	193	259	452
18-24	174	19	252	33	301	367	103	128	22	59	195	82	37	934	838	1 772
25-34	265	28	309	51	348	349	284	345	43	57	67	128	29	1 377	926	2 303
35-44	172	17	184	36	285	229	356	288	34	56	20	103	22	1 134	668	1 802
45-54	117	14	123	20	255	155	283	266	30	28	15	93	19	901	517	1 418
55-64	56	5	40	12	146	81	189	139	25	17	3	36	6	492	263	755
65 & Over	33	8	19	3	115	82	111	79	24	13	4	17	1	319	190	509
Unknown	50	3	446	21	26	20	28	10	10	6	1	21	8	581	69	650
TOTAL	905	100	1 424	194	1 583	1 376	1 361	1 280	197	251	652	524	147	5 994	4 000	9 994

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

while Portland recorded the lowest (7). The murder rate for all parishes is listed in Box 3. At the end of the year, 404 cases had been cleared up.

Shootings

Reported shootings totalled 1 095, which reflects an 11.8 per cent decline compared with 2013. By the end of the year, 361 cases had been cleared up. Additionally, there were 125 fatal shootings⁵, 50.8 per cent less than in 2013. Of this total, 87.2 per cent was due to police shootings. During the year,

99 firearms and 2 893 rounds of ammunition were reported stolen. The JCF however recovered 614 firearms and 9 603 rounds of ammunition.

Missing Persons

A total of 2 729 persons were reported missing during the year, which was 12.5 per cent less than in 2013. Some 72.8 per cent (1 987) was children, of which 78.9 per cent was female; while of the 742 adults reported missing 63.2 per cent was male. Some 2 408 persons (1 835 children) were returned or

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.

BOX 3: MURDER RATE BY PARISH, 2014

PARISH	RATE PER 100 000
St. James	86
Hanover	56
Kingston and St. Andrew	44
Clarendon	40
St. Catherine	40
Westmoreland	35
Trelawny	29
St. Mary	22
St. Ann	22
Manchester	22
St. Elizabeth	14
St. Thomas	13
Portland	9

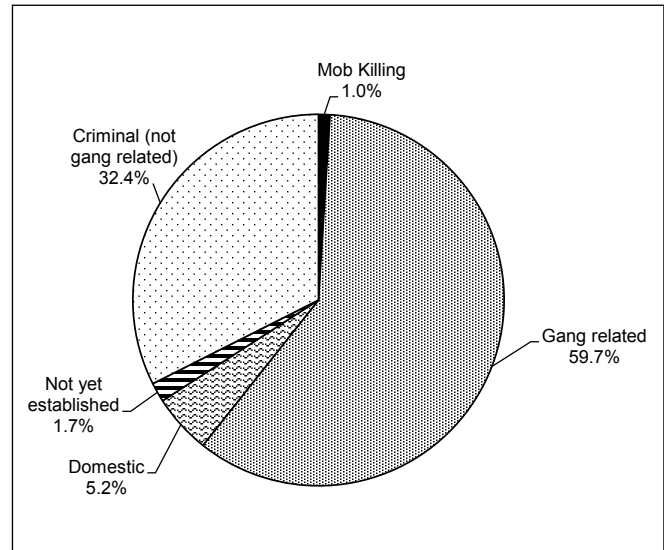


FIGURE 24D: MOTIVES FOR COMMITTING MURDER, 2014

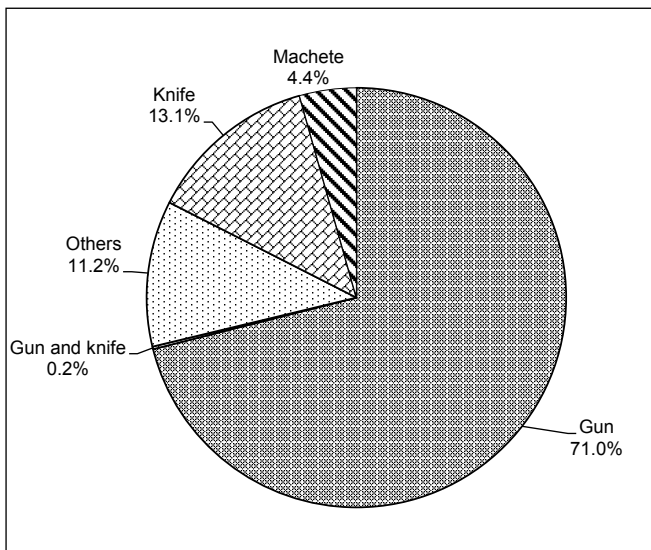


FIGURE 24C: PERCENTAGE DISTRIBUTION OF TYPES OF IMPLEMENTS USED IN MURDER, 2014

found, 57 (7 children) were confirmed dead, while 264 (145 children) were still unaccounted for at the end of the year.

Suicides

There were 52 reported cases of suicide (44 male). Most of those who committed suicide were in the 25–34 age group (17 cases), followed by the 18–24 age group (9 cases) and the 35–44 (6 cases), while there were 11 cases for which the age was unknown. The most common method used was hanging, which accounted for 76.9 per cent of all suicides followed by the ingestion of a poisonous substance, 11.5 per cent. The main contributing factors were depression and mental disorder (19.2 per cent each), while for 61.6 per cent the reasons were unknown.

Deportation

A total of 1 984 Jamaicans (83.9 per cent male) were deported during the year, 7.2 per cent less than in 2013 (Table 24.7). Overstaying, illegal entry and illegal re-entry continued to be the main reason (45.3 per cent) for which persons were deported, followed by drug infringements, with 27.8 per cent. Some 67.5 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. The downward trend continued with a 12.2 per cent reduction in the total number of persons deported from these three countries. The largest proportion of deported persons, 42.0 per cent, came from the USA, followed by the UK with 14.6 per cent. The majority of persons deported from the USA and the UK, 83.8 per cent and 651.7 per cent, respectively, was for criminal activity; while the majority of those deported from Canada (59.4 per cent) and other countries (81.4 per cent) were for overstaying or illegal entry/re-entry. Over 71.5 per cent of persons deported returned to the parishes of Kingston and St. Andrew, St. Catherine, Clarendon and St. James.

Traffic

There were 331 fatalities which resulted from 300 traffic collisions compared with 306 fatalities from 274 collisions in 2013. The parishes of St. Catherine (67), St. Andrew (45), Westmoreland (42), St. Ann (27), Clarendon (26) and St. James (25) recorded the most fatalities, while St. Thomas recorded the lowest number of fatalities (3) {Table 24.8}. An analysis of fatalities as a result of traffic accidents showed that 29.9 per cent was pedestrians, 19.7 per cent motor cyclists, and 15.1 per cent private motor car drivers. Approximately 10.6 per cent of the victims were below 20 years of age compared with 12.1 per cent in 2013. Males accounted for 81.0 per cent of all road fatalities (Table 24.9). Excessive speeding was identified

TABLE 24.7
NUMBER OF PERSONS DEPORTED TO JAMAICA BY TYPE OF CRIME AND COUNTRY, 2013 AND 2014

OFFENCE	2013					2014				
	USA	OTHER	ENGLAND	OTHER	TOTAL	USA	OTHER	ENGLAND	OTHER	TOTAL
Possession of Drugs	481	25	110	83	699	371	21	88	72	552
Firearm Offences	95	10	12	1	118	76	10	6	2	94
Murder, Manslaughter, Attempted Murder	41	7	11	4	63	49	5	5	3	62
Illegal Entry, Overstay, Illegal Re-entry	151	96	78	466	791	135	129	111	524	899
Larceny Offences	56	7	21	7	91	49	13	31	8	101
Fraud, False Document	50	5	16	18	89	28	2	6	9	45
Wounding, Assault, Battery	89	12	18	3	122	64	20	21	6	111
Sexual Offences	34	6	12	2	54	28	7	8	3	46
Kidnapping	4	0	2	0	6	4	1	7	0	12
Money Laundering	11	0	1	0	12	8	0	1	0	9
Other Offences	38	18	10	28	94	21	9	6	17	53
TOTAL	1 050	186	291	612	2 139	833	217	290	644	1 984

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

as the main cause of accidents (27.3 per cent) followed by “other factors” (22.0 per cent), failure to keep near side (16.3 per cent) and pedestrian error (14.7 per cent). Tickets issued for traffic offences totalled 491 571, valuing just under \$1.0 billion. The fines for 230 741 tickets were paid at the Inland Revenue department, 203 192 were still in court, 21 572 were settled in court, while 36 066 were still outstanding.

Anti-Crime Measures

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:

- Merger of the ISCF into the JCF, effective in May
- Construction of a police post in the Meadows of Irwin housing development by the West Indies Home Contractors. This is the first police post established through private/public sector collaboration.
- Launch of the First Responder Violence Interruption Strategy, spearheaded by Northern Caribbean University in collaboration with the JCF’s Community Safety and Security Branch. “Violence Interrupters” are trained to identify, respond to, and interrupt

TABLE 24.8
REPORTED ROAD ACCIDENTS INVOLVING FATALITIES BY PARISH, JANUARY 1 - DECEMBER 31, 2014

PARISH	NUMBER OF ACCIDENTS INVOLVING FATALITIES	NUMBER OF PERSONS KILLED
Clarendon	21	26
Hanover	14	15
Kingston	12	12
Manchester	15	15
Portland	11	11
St. Andrew	40	45
St. Ann	23	27
St. Catherine	61	67
St. Elizabeth	16	17
St. James	22	25
St. Mary	8	9
St. Thomas	3	3
Trelawny	16	17
Westmoreland	38	42
TOTAL	300	331

Source: Jamaica Constabulary Force, Statistics and Information Management Unit

TABLE 24.9
AGE GROUP AND SEX OF ROAD USERS WHO DIED IN TRAFFIC ACCIDENTS 2013 AND 2014

Age Group	2013 ^r			2014		
	Male	Female	Total	Male	Female	Total
00–04	3	1	4	2	3	5
05–09	2	2	4	5	2	7
10–14	5	2	7	0	2	2
15–19	12	10	22	17	4	21
20–24	24	5	29	38	4	42
25–29	31	5	36	30	4	34
30–34	17	7	24	27	5	32
35–39	27	4	31	12	5	17
40–44	17	2	19	19	4	23
45–49	15	1	16	15	6	21
50–54	14	1	15	18	5	23
55–59	16	2	18	16	4	20
60–64	13	4	17	14	2	16
65–69	5	1	6	11	4	15
70–74	12	2	14	6	2	8
75 & OVER	14	9	23	6	3	9
Unknown	21	1	22	32	4	36
TOTAL	248	59	307	268	63	331

r - revised

Source: Jamaica Constabulary Force, Police Traffic Department

violence, as well as monitor their communities and provide referrals.

- Establishment of a National Strategic Anti-Gang Unit in the Organized Crime Investigation Division (OCID) of the JCF to lead and coordinate anti-gang investigations in geographic formations. Since the enactment of the Anti-Gang legislation in April, there have been 80 arrests.

Major Organized Crime and Anti-Corruption Task Force

The Major Organized Crime Task Force and the JCF's Anti-Corruption Branch were merged to form the Major Organized Crime and Anti-Corruption Agency (MOCA). The new agency will have a greater reach and increased capacity to carry out investigations on persons of interest, including the police and those in public office. As at December 17, 2014 MOCA had 24 major organized criminal cases, 115 police corruption cases and 5 public sector corruption cases before the Court. A Vetting and Polygraph Unit was established in October under MOCA, with seven certified polygraphers. Apart from vetting government officials assigned to sensitive posts, there is indication that the unit will be conducting forensic polygraphs on individuals suspected of being involved in corrupt activities.

Community Safety and Security Branch

The Community Safety and Security Branch (CSSB) undertook a number of activities geared towards fostering improved relations between the police and the citizenry. The CSSB continued to work with **Police Youth Clubs (PYCs)** islandwide and four PYCs were each reactivated, sensitized and launched. There were a total of 480 active, 103 inactive and 64 dormant PYCs islandwide. Work also continued under the **Neighbourhood Watch Programme (NWP)** with one group reactivated, four sensitized and eight launched (includes two that were relaunched). There are 383 active and 347 inactive NWPs islandwide. The CSSB also sought to build partnerships with a number of key stakeholders by participating in over 580 meetings islandwide.

There was a reduction in the number of active School Resource Officers (SROs) and schools that are a part of the **Safe School Programme**. The number of active SROs was reduced by 34.7 per cent to 179 and the number of participating schools by 13.6 per cent to 133. During the year, 6 790 searches were conducted, of which 6 117 were student searches, 633 were school compound searches and the remaining 40 were described as "other" searches. A number of weapons were seized, of which 138 were knives, 347 pairs of scissors, 23 ice picks, 5 machetes and 23 other weapons. There were 118 cases of seizure of marijuana. Some 438 incidents were reported, which included 2 murders, 226 fights, 62 cases of theft, 18 cases of wounding, 33 instances of sexual offence, 11 cases of robbery and 86 "other" incidents. The actions taken by the police included 32 arrests; 1 470 students

cautioned/warned; 774 students referred to other agencies such as the Child Development Agency, probation offices or various detox centres; 465 students being monitored; and 24 were described as "Other Actions". A Safe School Mentorship programme was started at Calabar High School, Possibilities St. Andrew Care Centre, Friendship Primary School and the Young Men Christian Association (YMCA). A Safe School Symposium was also held during the year.

Organized Crime Investigation Division

A number of initiatives were undertaken to improve the effectiveness of the Organized Crime Investigation Division (OCID). This included the construction and operationalization of a Case Management Unit and the establishment of the Guns for Drugs Trade Taskforce (G4T). The National Strategic Anti-Gang Unit (NSAU) within OCID continued its efforts to manage gangs and gang violence. A Standard Operating Procedure (SOP) manual was developed to guide the work of the NSAU. A Terms of Reference was developed for the National Strategic Anti-Gang Coordinating Committee (NSACC) and the Area Strategic Anti-Gang Coordinating Committee (ASACC) thus creating a formal framework to coordinate anti-gang efforts throughout the JCF. A coordination centre was established which will among other things serve as the Secretariat for NSACC. A comprehensive protocol to guide investigations under the Criminal Justice (Suppression of Criminal Organisation) Act, 2013 was developed. Operationally, five members from five major gangs in Kingston, St. Andrew and St. Catherine were arrested and charged for varying offences under the Criminal Justice (Suppression of Criminal Organisation) Act 2013. There was also the seizure of 14 guns and 337 assorted rounds of ammunition, and heavy duty equipment that was being used for illegal sand mining.

The division also launched "Operation ID-Fix" which targets, as the primary areas of focus, brothels; massage parlours; and workers with foreign nationalities employed in guest houses, wholesales and gift shops who may have been exposed to forced sexual exploitation, forced labour, servitude, sex-tourism, prostitution and pornography. This led to 29 operations being conducted which resulted in the rescue of four victims, identification of eight suspected victims and the arrest of three persons. Some 150 persons were interviewed and 2 172 persons sensitized.

The OCID conducted 27 operations in relation to intellectual property offences, arrested and charged 49 persons, seized assets with a street value of \$620.0 million and sensitized 935 persons. There were 39 matters before the courts. In the case of electronic fraud, 120 cases were reported, 20 operations conducted and 65 cases cleared up. The amount of money stolen totalled just under \$34.5 million and just under US\$60 000.00. The division also investigated 30 cases of money laundering.

The Fugitive Apprehension Team arrested six fugitives, deported three and extradited another five persons. As it

relates to kidnapping and extortion, OCID investigated three cases of kidnappings and rescued all the hostages. The division received 30 complaints of extortion.

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, 582 calls were received which led to 49 arrests: 16 for illegal electricity connection; 14 drug related; 9 illegal possession of firearm; 2 each for rape and crime of the month⁶; and 1 each for murder, assault, child in need of care, fraud, negligence and possession of stolen property. The ratio of successes to calls investigated was 1:7 compared with 1:8 in 2013. A breakdown of calls received showed that 18.7 per cent was related to illegal electricity connection; 14.1 per cent illegal firearms and ammunition; 10.3 per cent drugs; 8.4 per cent gunmen; and 7.0 per cent wanted persons. As a result of information received the following were seized or recovered: 12 illegal firearms and 61 rounds of ammunition; 47.25 kilograms (kg) of cured marijuana; and 4 stolen motor vehicles. Additionally, 2.5 hectares of marijuana, 8 000 marijuana seedlings and 0.9 kg of marijuana seeds were discovered.

The value of narcotics seized and destroyed was approximately \$12.5 million. The total value of property recovered was approximately \$5.4 million, 10.2 per cent more than in the previous year. At the end of the period, \$722 200 was paid out in rewards. Since its inception in September 1989, a total of 24 506 calls have been received, of which 18 669 were investigated. This has led to 2 320 arrests (308 for murder), the seizure of narcotics valuing almost \$664.6 million and the recovery of property valuing just over \$220.0

million, while approximately \$22.0 million has been paid out in rewards.

Transnational Crimes and Narcotics Division

The Transnational Crimes and Narcotics Division (TCND) of the 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, 577.5 hectares of marijuana, 2 750 536 seedlings, 338.0 kg of marijuana seeds, 15 926.3 kg of cured marijuana and 20 marijuana nurseries were destroyed. Additionally, 23 308.6 kg of cured marijuana, 383.8 kg of cocaine, 20.5 kg hashish, 0.4 kg hash oil and 0.4 kg of crack 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, some 9 365 arrests (99.1 per cent Jamaicans) were made for breaches, a 30.7 per cent decline compared with 2013. Males made up the majority of those arrested (96.2 per cent locals and 75.3 per cent foreigners). Of the foreigners arrested, 31 were British, 16 American, 6 Canadian and 28 other nationalities. The division made 189 arrests at the country's main access points, namely: Norman Manley International Airport – 123; Donald Sangster International Airport – 59; and seaports – 7. There were 51 cases of ingestion and 15 cases of insertion.

Bureau of Special Investigations

The Bureau of Special Investigations (BSI) conducts investigations into shooting incidents on behalf of the

TABLE 24.10
QUANTITY AND TYPE OF DRUGS SEIZED AND DESTROYED, 2013–2014

TYPE OF DRUG	QUANTITY		REMARKS
	2013	2014	
MARIJUANA			
Cured (kg)	30 873.5	23 308.6	seized
Cured (kg)	10 754.8	15 926.3	destroyed
Plant (hectares)	247.3	577.5	destroyed
Seedlings (units)	1 923 300.0	2 750 536	destroyed
Seeds (kg)	285.3	337.9	destroyed
Nurseries (units)	64	20	destroyed
COCAINE (kg)	1 230.2	383.8	seized
CRACK (kg)	4.0	0.4	seized
HASH OIL (kg)	80.9	0.4	seized
HASHISH (kg)	22.6	20.5	seized
ECSTASY (tablets)	153	0	seized

Source: Jamaica Constabulary Force, Transnational Crime and Narcotics Division

6. The crime of the month is the crime publicized in the media for which Crime Stop requests the public's assistance in solving.

Commissioner of Police. A total of 213 shooting incidents were reported to the BSI and of this number, 100 were fatal shooting incidents and 80 shooting injury incidents. A total of 177 investigations were completed, of which 114 were backlog cases. Of the cases completed, 106 were fatal shootings, 60 shooting injury incidents, 4 jail break/prisoner escape, and 7 miscellaneous. Forty-three 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. Some 419 files were still awaiting certificates. Additionally, 25 cases were submitted to the Inspectorate of Constabulary for departmental action.

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, 169 visits, 20 inspections and 7 thematic audits were conducted. The thematic audits focused mainly on firearms, ammunition and exhibit stores in the following Divisions: Clarendon, St. Andrew South, Kingston Central, St. Catherine South, Trelawny, Kingston Western and St. Mary. An assessment was done of all divisional armouries to determine their capacity and capability to function consistent with policies and laid down procedures. It was established that several of the armouries needed renovation and retrofitting to function efficiently and therefore, the cost estimate along with a priority listing was developed and submitted for urgent remedial action.

The Investigation Unit of the IOC conducts investigations into complaints made against police officers. A total of 785 complaints were received, of which 253 were resolved informally while the remaining 532 reports required formal investigation. Some 215 investigations were completed, of which 97 were for complaints received during the year. A total of 174 service vehicle accident investigations were reviewed. As a result of these reviews, 99 police officers were suspended from driving duties after it was established that they drove service vehicles in a manner which contravened the Law or Force Policy, 75 were allowed to continue driving duties as it was determined that the accident was not as a result of their negligence, while 30 had their driving duties reinstated. There was a 46.3 per cent increase in the number of service vehicle accidents compared with 2013.

The Compliance Officer Programme that was launched in 2013 continued with 23 Compliance Officers being trained and assigned. Under this programme, Compliance Officers are placed in various divisions and formations, with their function being to monitor compliance with force policy.

Training

The National Police College of Jamaica (NPCJ) was established based on a Cabinet decision dated June 9, 2014 which authorized the merging of various entities into one police training institution. The core function of the NPCJ is the coordination and execution of training for the JCF. The NPCJ has three faculties and three main support departments/units namely:

- Faculty of Leadership and Professional Development
- Faculty of Skills Training
- Faculty of Recruit and Probationary Training
- Department of Force Recruiting
- Central Administration
- Curriculum Development and Co-ordination Unit.

An application to have the NPCJ registered as a tertiary institution was submitted to the University Council of Jamaica. A new Academic Board was established and the Training Advisory Board reintroduced. Additionally, the College's training curriculum was revised and a Business Development Plan prepared.

The Faculty of Leadership and Professional Development (formerly the JCF Staff College) is focused on creating a professional workforce which has the capacity to respond appropriately to regional and global challenges of crime, violence, public disorder and general lawlessness, which confront societies and law enforcement organizations. Some 999 persons were trained in a number of areas including child rights, statement writing, witness management and investigative techniques. The Academic Unit within the faculty partnered with the College of Policing in the United Kingdom to deliver training in curriculum development and training needs analysis.

The Faculty of Recruit and Probationer Training (formerly the Jamaica Police Academy) graduated 584 new police constables during the year. A training of trainers' course in the use of less lethal force was held for 27 participants. This training was sponsored by the United States of America government through its embassy. At the end of the course, the following items were donated to the JCF by the sponsors:

- 50 26" RCB expandable batons and holders
- 50 handcuffs and holders
- 30 duty belts (medium)
- 1 mace (large tank plus refill)
- 50 pepper sprays and holders
- 40 duty belts (large)

- 5 mats (large)
- 50 duty belt fasteners
- 3 practice dummies.

The faculty trained and confirmed 509 probationers bringing the total number of trained probationers to 1 113. Additionally, an online Probationers Training Programme was introduced. The Firearms and Tactical Training Unit certified 599 and recertified 6 002 JCF members in the use of firearms employed by the Force.

The Faculty of Skills Training houses two skills training departments: the Caribbean Search Centre and the Department of Force Driving. The Caribbean Search Centre is the hub of specialized training, advice and expertise in search operations which include the detection of firearms, explosives and narcotics. It provides services for both local and regional security operatives. During the period, 815 persons were trained. The Department of Driving Training conducted 10 qualifying courses for 244 persons. An upgrading course—a Driver Behaviour Index Course sponsored by the National Road Safety Unit in the Ministry of Transport, Works and Housing—was conducted for ten persons at the Caribbean Maritime Institute.

The NPCJ also trained persons to perform duties as District Constables for several external agencies. The agencies and numbers trained are as indicated below:

- Transport Authority – 63 Route Inspectors
- Marksman Security – 53 Security Officers
- Ministry of Local Government and Community Development – 48 Municipal Police
- Ministry of National Security (Justice Protection unit) – 10 Close Protection Officers.

Other courses facilitated by the College for external partners included:

- United Nations Development Programme (UNDP) – Safe and Secure Approaches in Field Environments, 21 participants
- UNDP – Kidnapping/Hostage and Extortion Negotiation Training, 24 participants
- UNDP–Counter Narcotics Intelligence, 24 participants
- International Committee of the Red Cross – Train the Trainers course on International standards for Use of Force in Law Enforcement, 27 participants.

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 revised NSP “A New Approach: National Security Policy for Jamaica” (Ministry Paper #63) was presented to the House of Representatives by the Prime Minister in April and to the Senate in May. The focus was on communication efforts and informing representatives of ministries, departments and agencies (MDAs) about the new policy. Copies of the National Security Policy were made available to MDAs and uploaded to the websites of the Office of the Cabinet, Parliament and the MNS. The NSPCU newsletter “Security Connect” is one communication tool used to disseminate information to MDAs and the public. The newsletter, among other things, enabled the Unit to consistently inform about the Policy, security issues and possible new and emerging threats. During the year, a total of 1 000 copies of three editions of the newsletters were distributed. Some 4 033 copies of the Directory of Security Related Services were distributed to the general public, schools and to MDAs. Of that number, 1 820 were distributed to schools with the approval of the Ministry of Education. These were distributed through the guidance counsellors to be used as a resource booklet for children. A factsheet on the work of the NSPCU was developed and disseminated both in hard and soft copies.

One of the strategies to enhance public awareness was the hosting of a seminar on topical issues that have an impact on National Security. The two-day event was planned around the theme, “National Security for Jamaica, enabling and supporting investment for national development” and featured a tour of the logistics related facilities on the first day. The seminar also featured an international speaker on regional security and local experts in the field who are contributing to the development of a logistic centred economy. Approximately 25 persons participated in the tour and 52 persons attended the seminar. The NSPCU continued to provide secretariat services to the National Security Council and monitored and coordinated the implementation of the National Security Policy. This included the preparation of an annual report which outlined progress on implementation of the National Security Policy and identified gaps to be addressed.

During the year, there were some major threats to Jamaica that could have negatively impacted national security and the nation’s stability. These threats were related to health security namely, the outbreak of the Chikungunya virus (ChikV) and the threat of the Ebola virus; and cyber security, in the form of the lottery scam which is now a billion dollar industry. As a result of health threats, the National Response Mechanism was activated. The response included: identifying the Ministry of Health as the chief technical agency and the Office of Disaster Preparedness and Emergency Management (ODPEM) as the lead coordinating and implementing agency; utilizing legislative provisions to have landing restrictions placed on travellers visiting from, or travelling through, countries experiencing the Ebola virus outbreak; identifying equipment and other materials related to controlling the spread of ChikV and managing the potential threat of the Ebola virus; and

training of personnel. As it relates to cyber security, a Cyber Security Task Force with representatives from MNS, JCF and the Ministry of Science, Technology, Energy and Mining has been established and consultations held regarding the development of a Cyber Security Strategy.

National Crime Prevention and Community Safety Strategy (NCPCSS)

The Unite for Change (UFC) Movement was launched in December 2013 as the main vehicle through which the National Crime Prevention and Community Safety Strategy would be implemented. During the review period, a number of awareness campaigns were held, which included the direct engagement of over 3 000 persons islandwide, inclusive of communities, government personnel and non-government organizations. A forum was held in January with 1 000 attendees on the issue of violence prevention. The UFC partnered with a number of groups in support of achieving the outcomes agreed within the UFC framework. These included:

- Northern Caribbean University (NCU) and the Jamaica Constabulary Force (JCF) – training in interruption techniques for Domestic Violence
- Ministry of Education – School Behaviour Modification Programme
- Peace and Love in Society – alliance with groups in Tivoli Gardens, Denham Town and Mathews Lane after offering training for community curfew monitors
- Sandals Foundation, the Firearm Licensing Authority and the MNS – using confiscated and obsolete firearms to create a “Peace of Art” sculpture
- Joan Duncan Foundation – development of the Social Intervention Programme Database which upon completion will be available to all ministries for similar use
- National Parenting Support Commission – Parent Talk Series
- National Association of Families – activities focused on improving parenting particularly of fathers
- Street Pastors Programme – a faith-based programme to provide guidance and support at night to marginalized and vulnerable individuals on the streets.

The UFC Secretariat also focused on activities in support of the coordination aspect of the movement and sharing of information between programmes and communities. These included:

- Establishment of a “Collaboration for Development” (C4D) portal to be populated with information regarding violence prevention actions taking place in communities
- Development and introduction of a guide for developing community plans. The guide is being used in selected communities to assist them in the development of violence prevention plans.

Trafficking In Persons

In its *Trafficking in Persons (TIP) Report 2014*, the US Department of State downgraded Jamaica to Tier 2 watch list. This ranking is awarded to:

“Countries whose governments do not fully comply with the Trafficking Victims Protection Act, 2000 minimum standards, but are making significant efforts to bring themselves into compliance with those standards and:

- The absolute number of victims of severe forms of trafficking is very significant or is significantly increasing;
- There is a failure to provide evidence of increasing efforts to combat severe forms of trafficking in persons from the previous year; or
- The determination that a country is making significant efforts to bring itself into compliance with minimum standards was based on commitments by the country to take additional future steps over the next year.”⁷

The JCF TIP Unit conducted 35 new investigations for TIP, of which nine were similar to trafficking. Some 94.3 per cent of the investigations were closed during the year. There were 31 raids conducted and 178 persons interviewed and 5 arrests made. 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. Seven cases were still before the court for prosecution. The Unit also sensitized 3 329 persons about TIP.

A number of public education exercises were undertaken to bring awareness to the issue of TIP and included the production of public service announcements to be aired on television and radio, development of a TIP curriculum for secondary school students (grades seven to nine), and development and publication of an anti-trafficking in persons Standard Operational Procedure (SOP) for police investigators. A Prosecutors’ Training Seminar was held with 88 participants

7. US State Department <http://www.state.gov/j/tip/rls/tiprpt/2013/210548.htm> (accessed February 10, 2015).

drawn from the following groups: Crown Counsel, Clerks of Court, Judges, Victim Support, and JCF OCID and TIP Units. Additionally, members of the National Task Force Against Trafficking in Persons and the TIP Secretariat participated in a number of training programmes, conferences and workshops locally and internationally.

Jamaica Crime Observatory - Integrated Crime Violence Information System

The data sharing protocol for the 17 member technical working group of the Jamaica Crime Observatory Integrated Crime and Violence Information System (JCO-ICVIS) was completed and disseminated. This data sharing protocol aims to provide the basis for an agreement among organizations engaged in the JCO-ICVIS on the use of information as well as facilitate and govern the efficient, effective and secure sharing of good quality information.

Other Security-related Initiatives

- The Forensic Science Laboratory and the Legal Medicine Unit were formally merged in September to form the Institute of Forensic Science and Legal Medicine.
 - Development of the GOJ Security Handbook.
 - Support provided to the Ministry of Tourism and Entertainment’s visitor arrival expansion thrust by the granting of visa waivers to 16 European countries including Russia, The Czech Republic, Poland, Slovakia, and the Ukraine; 7 Latin American countries; China; Guatemala; and Brazil.
 - Policy support was provided to the Passport, Immigration and Citizenship Authority in resolving 19 Immigration cases. The Citizenship Committee processed over 200 citizenship cases.
 - Development of a manual for applications for “permitted persons” status under Section 101A of the Proceeds of Crime Act in consultation with the Financial Investigations Division, the Bank of Jamaica and the Financial Services Commission. It sets out the process and criteria to be fulfilled by financial entities seeking “permitted person” status in order to carry out cash transactions in excess of the stipulated amount. Additionally, a communication plan was developed to educate the public on the issue.
 - Signing of the third Memorandum of Understanding (MOU) between the MNS and the National Crime Prevention Fund which manages Crime Stop.
- Maintenance and upgrading of the Closed Circuit Television (CCTV) systems operational in Mandeville, May Pen and Montego Bay and implementation of a CCTV system in Ocho Rios.
 - Preparation of a draft evaluation report identifying the strengths, weaknesses and gaps of the Safe Schools Programme, based on an assessment of the performance and impact of the programme conducted by the MNS.

Social Intervention Programmes

The main social intervention programmes were:

Citizens’ Security and Justice Programme

The funding agreement for the third phase of the Citizens’ Security and Justice Programme (CSJP III) was signed. CSJP III will provide services to 50 pre-selected communities across eight parishes⁸. Approximately half are in the Kingston Metropolitan Area. Services will be provided to a number of other communities, as necessary through a “Rapid Response” mechanism. The programme has three main components:

1. *Culture Change for Peaceful Coexistence and Community Governance*: Component 1 includes interventions that provide knowledge, skills, and opportunities allowing residents of target communities to challenge and change attitudes that promote or tolerate violence. All activities incorporate social marketing interventions meant to change attitudes and behaviours about interpersonal relations, gender equality and tolerance of violence. Activities include: parenting education; counselling and psychological services; violence interruption services; capacity strengthening of local governance structures such as Community Action Committees; situational crime prevention; and construction and equipping of community multi-purpose centres and other infrastructure.
2. *Labour Market Attachment and Employability*: Component 2 will deliver a comprehensive programme for selected youth operating at three different job-readiness levels:
 - a. Group 1 (highest job-readiness) will receive services such as short-term vocational and on-the-job training; job-seeking, placement and retention support services; tertiary education support (with the condition that beneficiaries do 120 hours of community service) and business development training

8. The parishes are Kingston and St. Andrew, St. Catherine, St. James, Clarendon, Westmoreland, St. Mary and St. Ann.

- b. Group 2 (intermediate job-readiness) will benefit from on-the-job training and work orientation (e.g. construction apprenticeships with the JDF, summer employment internships); secondary education support; and business development training
- c. Group 3 (lowest job-readiness) will receive remedial education, particularly the literacy and numeracy skills required to be able to participate in more advanced vocational training, and secondary school.

Component 2 includes: vocational and on-the-job training; job seeking and placement support; tuition assistance; remedial education; and business development services.

3. *Community Justice Services*: Component 3 seeks to increase access to (and usage of) justice services outside of the formal court system, following evidence-based models. Activities include: expansion of the Restorative Justice Programme to bring eligible cases to resolution in targeted communities; and child diversion programmes for steering juveniles in conflict with the law away from criminal charges, prosecution, and/or incarceration and providing them instead with structured community service tasks and a support committee. These include: legal aid services; mediation (including cases of school suspensions); Justices of the Peace who can address local disputes before they escalate; victim services (including for women and children); and strengthening the Ministry of Justice to manage and monitor community justice services.

During the period, the main focus was on completing projects still being implemented under phase II of the programme and undertaking preparatory work towards the implementation of phase III. The following were the main achievements:

- 118 persons participated in the on-the-job training programme with the Jamaica Defence Force (JDF) slated to end in May 2015 and 10 Student Supervisors from the previous set of JDF interns were assigned to the current group
- 120 persons from the KMA, Central and Western Regions completed skills training at the Caribbean Maritime Institute in the following areas: Heavy duty equipment, Multipurpose Rating, Industrial Plant Maintenance, Security Services, Truck driving and Renewable Energy
- 20 participants were engaged by the Jamaica Public Service Company Ltd in on-the-job training
- 5 multi-purpose community centres were renovated/expanded, 2 repaired and 1 constructed

- 190 youth (109 females) received permanent job placement
- 11 401 at-risk youth were engaged in 77 outreach sessions by the CSJP Men with a Message team
- 41 group counselling sessions held
- 39 Community Action Committees were given technical assistance to improve their governance structures
- 307 persons (165 males) participated in the Summer Diversion/Employment programme.

Jamaica Reducing Re-Offending Action Plan

The Jamaica Reducing Re-offending Action Plan (JRRAP) formally ended in March 2014. However, during the year reintegration services were provided to deported migrants and local ex-offenders. The services included reception and transportation, provision of emergency to medium-term accommodation, education and skill set training and entrepreneurial development. The primary objective of JRRAP was to establish a sustainable reintegration model for service delivery and therefore, engage registered implementing partners who are already being supported financially and technically by local government, specifically their respective parish councils, to continue the programme.

Under the programme, a survey on the “Rehabilitation and Reintegration of Juvenile and Adult Local Offenders” was conducted. This survey will help to inform the reintegration strategy which is to be drafted in the 2015/2016 Financial Year. The survey focused on rehabilitation and reintegration among juveniles and adult offenders within the correctional facilities as well as reintegration efforts among the “involuntary returning residents”. The study aimed to examine the impact of existing rehabilitative programmes, offered within the DCS, on local offenders as well as to explore the factors militating against reintegrating into society and offender awareness of non-governmental organizations programmes. The sample size comprised 353 respondents from six adult and three juvenile correctional centres.

Additionally, having identified the need to build awareness between 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, the following were undertaken:

- Basic Counselling in Sex Offender Management (*completed in 2014*)
- Sensitization Programme - Increasing Resilience against Sexual Abuse within Secondary Schools (*to be completed in 2015*)
- Monitoring of High Risk Deported Migrants (*in progress*).

Justice Security Accountability and Transparency Project

The Justice Security Accountability and Transparency Project (JSAT) is funded by the European Union in the amount of €12.6 million over five years. The financing agreement for JSAT was signed in May 2014 to support a number of key state and non-state institutions that are instrumental in breaking the cycle of organized crime and the administration of justice. The agreement supports the institutions' capacity to discharge its duties and strengthen the governance and accountability relations between them. The purpose of the project is to improve processes and capacities within the justice and security sectors to facilitate the reduction of case backlogs and corruption, and improved prosecutorial capacity particularly relating to organized crime including money laundering. The project addresses cross-cutting issues such as good governance and human rights, as these are central to the successful outcome of the project's activities. Furthermore, the cross-cutting issue of gender equality is particularly important to this project and will be mainstreamed into the activities wherever relevant. The issues of Child Rights and Violence against Women will be included in the priority actions under the Call for Proposals for support to civil society.

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 3 354 soldiers (182 females), while the strength of the Reserve Force was 427 persons. There were 226 officers (44 females) in the Regular Force and 51 officers in the Reserve Force. Some 208 recruits (45 females) enlisted during the year, with 11 commissioned as officers in the Regular Force. Four soldiers died. A total of 189 soldiers were discharged, with the main reasons being termination of engagement (114), final approval of attestation withheld (26), retired/resigned (Officers) {18}, services no longer required for any other reason (10) and end of current termination of service (8). Locally, the JDF continued to provide courses of instruction for its junior leaders and those of other CARICOM military services. Overseas participants are normally from Trinidad and Tobago, Barbados, Belize, Guyana, The Bahamas, St Kitts & Nevis, and Antigua & Barbuda. Nine courses were conducted over the period, with 150 participants, while 299 JDF personnel participated in 172 overseas courses/seminars. The JDF also embarked on a number of programmes in the area of community development (3), outreach (14), career expositions (76) and nation building (14) that impacted 54 800 persons.

The 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 conduct land, air, maritime and special operations. Under “Operation Resolve”, joint security operations were conducted in various police divisions. Under Operation “RED TAIL”, the JDF Coast Guard conducted Maritime Law Enforcement Operations to detect, interdict and apprehend vessels involved in illegal unregulated and unreported fishing, and the poaching of lobsters or any other violation. The Moneague based Battalion supported the JCF in conducting several anti-narcotics operations under “Operation Buccaneer” which is aimed at the eradication and interdiction of marijuana in all phases of its cultivation, processing, storage and transshipment. These operations resulted in the destruction of 3 526.45 kgs of cured marijuana, 687 553 marijuana seedlings, 82.2 kgs marijuana seeds, 97.35 kg Mash and 245.3 hectares of marijuana fields with a total value of just over \$242.5 million.
- B. *Support to other government agencies and departments* – The JDF assisted several governmental agencies and departments over the period of review. The work programme managed by JDF Engineers for the Citizens' Security and Justice Programme continued. This programme assists inner-city youth with employment and skills training in areas such as Auto Mechanics, AC and Refrigeration, Electrical Installation, Food Preparation, General Construction, Mechanical Engineering, Plumbing and Welding. There are 120 interns in the programme, which is slated to end in May 2015. A total of 238 high school and tertiary level students on work experience were also facilitated. The JDF undertook a number of internal and external construction and refurbishment projects such as the expansion of storage space for the Forensic Laboratory; construction of a building to house the Joint Intelligence and Operation Centre; and renovation of a number of schools. The JDF Air Wing (AW) also conducted 143 CASEVAC operations for the Ministry of Health, 61 cases of air support for the JCF, 154 VIP missions, 6 cases of air support for Operation Buccaneer and 12 flights for other external organizations.
- C. *Monitoring and control of airspace and maritime areas of jurisdiction* – This role was primarily achieved through the deployment of the JDF Coast Guard's (CG) assets to conduct regular patrols of the

country's maritime areas of jurisdiction. The regular deployment of frequent patrols to protect the fisheries in the zone against illegal fishing and narcotics smuggling achieved the following results:

- 540 Narcotics Interdiction: 921 kg of Marijuana, 33 kg of Cocaine, 27 kg of Hash Oil and 8 vessels seized
- 532 Fisheries Patrols: 57 kg of Fin Fish recovered
- 234 Dive operations in Jamaican ports: 2 bodies recovered
- 2 Marine Pollution.

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 7 air searches and 41 sea searches, which resulted in 264 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. During the year, the Authority introduced a flexi-time system to better accommodate the varied work schedules of persons in the industry. A new database was also developed and implemented

to improve the efficiency and speed of the PSRA's service delivery. Twenty-six new security companies were registered and as at December 2014, there were 328 registered security companies. In addition, 1 039 new guards were registered. The total number of registered guards stood at 21 551, with 71.1 per cent being male.

DEPARTMENT OF CORRECTIONAL SERVICES (DCS)

Personnel

The strength of the DCS stood at 2 352, with 2 212 Correctional Officers and 140 Probation Officers. Thirty persons retired and a similar number resigned. Some 1 139 members of staff participated in formal training activities, which included various security-related courses and training in Emergency Response and Baton Drill.

Custodial and Non-custodial Clients

The adult custodial population as at December 31 was 3 190, which is a 4.2 per cent reduction compared with 2013. Nonetheless, the Tower Street and St. Catherine Adult Correctional Centres continued to operate at 86.1 per cent and 23.2 per cent above capacity⁹, respectively. A total of 1 733 persons (91.9 per cent male) were incarcerated compared with 1 975 in 2013¹⁰. Of the total admissions, 21.8 per cent was for larceny/larceny of motor vehicle; 13.4 per cent for breaches of the Dangerous Drugs Act 1975; 9.5 per cent for wounding; 7.3 per cent for minor/other offences; and 7.3 per

TABLE 24.11
TOTAL ADMISSIONS TO ADULT CORRECTIONAL INSTITUTIONS BY OFFENCE, AGE AND SEX, 2014

OFFENCE	17–20	21–25	26–30	31–35	36–40	41–45	Over 46	Total Male	Total Female	Total
Murder/Manslaughter/Attempted murder	4	12	13	12	9	6	7	59	4	63
Unlawful wounding/wounding with intent	23	32	29	21	19	22	18	156	8	164
Sexual Offences	2	9	15	7	11	16	30	90	0	90
Offences Against the Person	12	24	16	9	14	10	9	87	7	94
Robbery/Robbery with aggravation/Burglary	28	48	18	12	8	7	5	125	1	126
Illegal possession of firearm/ammunition	15	33	33	17	6	3	1	108	0	108
Shooting with Intent	2	7	8	2	1	1	0	21	0	21
Larceny/Larceny of Motor Vehicle	54	75	58	57	35	41	58	359	19	378
Forgery, Fraud, Embezzlement	2	15	16	8	12	11	32	74	22	96
Unlawful Possession of/receiving stolen property	9	13	10	11	9	5	7	62	2	64
Malicious Destruction of Property	1	5	11	9	4	2	2	33	1	34
Breaches of the Dangerous Drug Act	8	39	44	41	29	24	47	183	49	232
Debtor/Breach of Debtor Act	0	5	2	5	9	11	18	37	13	50
Minor/Other Offences	13	22	25	21	14	11	20	114	12	126
Traffic Offences	2	9	14	10	7	5	17	64	0	64
Escaping custody	4	8	2	6	0	1	2	21	2	23
Total	179	356	314	248	187	176	273	1593	140	1 733

Source: Department of Correctional Services

9. Maximum capacity for the Tower Street and St. Catherine Adult Correctional Centres is 850 persons each.

10. The total number of persons admitted includes new admissions and recidivists (repeat offenders).

TABLE 24.12
TOTAL NEW ADMISSIONS TO ADULT CORRECTIONAL CENTRES BY AGE, 2014

AGE	Tower Street ACC	St. Catherine ACC	Fort Augusta ACC	Total
Under 17	0	0	0	0
17–20	9	29	0	38
21–25	39	98	4	141
26–30	49	98	4	151
31–35	29	98	4	131
36–40	41	67	2	110
41–45	36	69	4	109
46 & over	36	112	10	158
Total	239	571	28	838

Source: Department of Correctional Services

TABLE 24.13
NUMBER OF READMISSIONS TO ADULT INSTITUTIONS
BY SEX, 2010–2014

SEX	YEAR				
	2010	2011	2012	2013	2014
Male	500	490	552	538	482
Female	26	10	15	12	15
TOTAL	526	500	567	550	497

Source: Department of Correctional Services

cent for robbery/robbery with aggravation/burglary. The main crime for which females were admitted (35.0 per cent) was for breaches of the Dangerous Drugs Act 1975 and fraud (15.7 per cent), while the majority of males admitted (22.5 per cent) was for larceny, breaches of the Dangerous Drugs Act 1975 (11.5 per cent) and wounding (9.8 per cent) {Table 24.11}. At the end of the year, 691 persons were still awaiting sentencing.

Of all admissions, 1 236 persons (1 111 males) were new and 497 (482 males) were readmissions. Jamaicans accounted for 97.2 per cent of those admitted followed by British Nationals at 0.8 per cent. Most (62.2 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 55.6 per cent, up from 53.6 per cent in 2013 (Table 24.12). As with previous years, the largest number of new admissions came from the 21–25 and 26–30 age groups. Some 27.6 per cent of new admissions had previous convictions with non-custodial sentences. There was a 9.6 per cent reduction in the number of readmissions (Table 24.13). Approximately 68.8 per cent of readmissions were sent to SCACC and some 22.7 per cent was in the 46 and over age group (Figure 24E). First-time reoffenders accounted for 54.5 per cent of recidivists, 15.9 per cent

reoffended twice, 15.1 per cent reoffended three times, 10.9 per cent reoffended at least four times and 3.6 per cent was

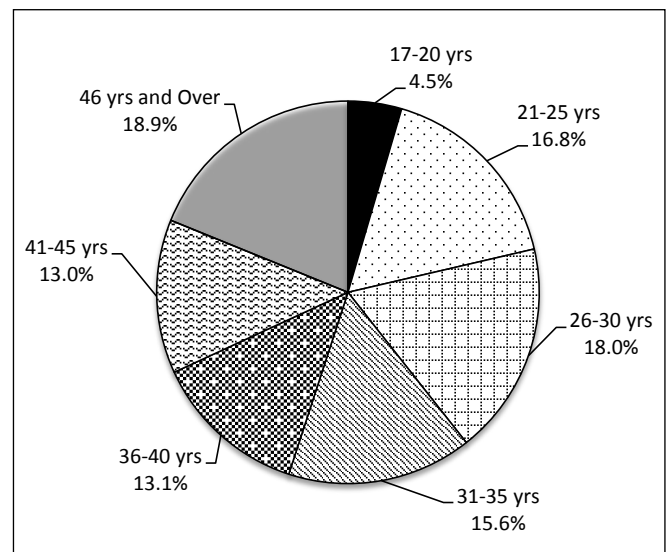


FIGURE 24E: AGE GROUP OF RECIDIVISTS TO ADULT CORRECTIONAL CENTRES, 2014

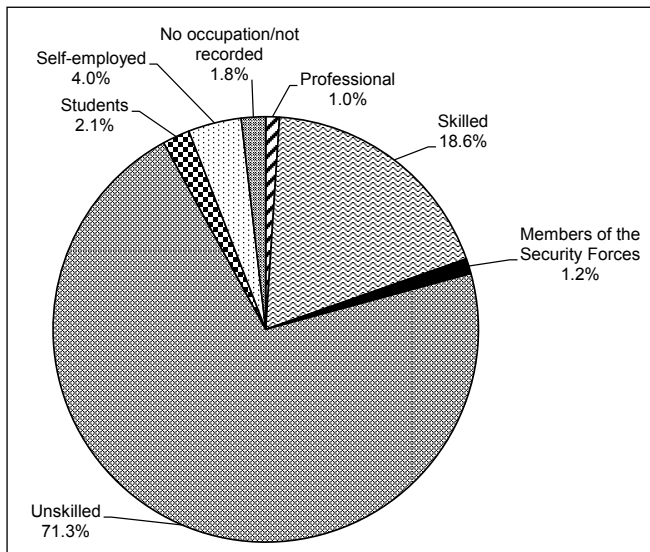


FIGURE 24F: OCCUPATIONAL STATUS OF NEW ADMISSIONS TO CORRECTIONAL CENTRES, 2014

unknown. The readmission rate was 28.7 per cent and the recidivism rate 48.4 per cent.

Of the total number of persons admitted, 71.2 per cent was unskilled. A total of 20 persons were members of the security services (police officers, soldiers and security guards) and another 36 were students (Figure 24F). Additionally, of the 3 190 persons incarcerated, 53.2 per cent was involved in training/work programmes and 18.5 per cent was involved in miscellaneous activities. The remaining persons were not engaged.

The juvenile custodial population at the end of December was 241 (210 males). Of this number, 123 were on correctional

**TABLE 24.14
POPULATION FIGURES OF JUVENILE INSTITUTIONS
AS AT DECEMBER 31, 2014**

INSTITUTION	REMAND	SENTENCED
Hill Top Juvenile Correctional Centre	0	56
Rio Cobre Juvenile Correctional Centre	0	53
Diamond Crest (Armadale JCC)	0	0
Horizon Adult Remand Centre (Male)	11	0
Metcalfe Street Secure Juvenile Centre	90	0
South Camp Juvenile Correctional Centre	17	14
TOTAL	118	123

Source: Department of Correctional Services

orders and the remaining 118 on remand (Table 24.14). A total of 90 youth (84 males) were admitted to the island's juvenile institutions (Table 24.15). Most were admitted for larceny/shop/house breaking (36.7 per cent), followed by illegal possession of firearm/ammunition (11.1 per cent), robbery/robbery with aggravation and wounding (7.8 per cent each), and other sexual offences (6.7 per cent).

The number of juveniles appearing before the courts was 2 193 (71.2 per cent male) compared with 2 850 in 2013 (Table 24.16). Approximately 28.5 per cent was for care and protection/child abandonment and 14.8 per cent for uncontrollable behaviour. Others committed offences such as "wounding/assault/assault occasioning bodily harm" (15.4 per cent), "robbery/robbery with aggravation/burglary/larceny/break-in" (10.7 per cent) and "dangerous drugs" (8.9 per cent).

**TABLE 24.15
ADMISSION TO JUVENILE INSTITUTIONS BY AGE, SEX AND OFFENCE, 2014**

OFFENCE	13 years	14 years	15 years	16 years	17 years	Total Male	Total Female	Grand Total
Murder/Manslaughter	0	0	1	0	0	1	0	1
Shooting with Intent	0	0	0	0	2	2	0	2
Wounding	0	4	1	0	2	5	2	7
Possession of Offensive Weapon/ Illegal Possession of Firearm/ammunition	0	0	2	3	7	12	0	12
Shop/House Breaking/Larceny	1	3	6	11	12	32	1	33
Breach of Supervision Order	0	0	0	0	0	0	0	0
Breach of Probation Order	0	0	0	2	1	3	0	3
Dangerous Drug	0	1	0	0	2	3	0	3
Assault/Assault occasioning bodily harm	1	0	2	0	0	2	1	3
Sexual Offences	0	0	0	2	4	6	0	6
Malicious Destruction of Property	0	0	3	0	0	3	0	3
Burglary/Robbery	0	1	0	1	6	8	0	8
Uncontrollable Behaviour	0	1	1	0	1	2	1	3
Breach of Fit Person Order	0	0	0	0	0	0	0	0
Care and Protection	0	0	0	0	0	0	0	0
Escaping Custody	0	0	0	0	0	0	0	0
Unlawful Possession/Receiving Stolen Property	0	0	1	1	2	4	0	4
Others	0	0	1	0	1	1	1	2
TOTAL	2	10	18	20	40	84	6	90

Source: Department of Correctional Services

TABLE 24.16
REASONS JUVENILES APPEARED BEFORE THE COURT, 2012–2014

MAIN CATEGORIES	2012		2013		2014	
	M	F	M	F	M	F
OFFENCE						
Murder/Manslaughter	7	1	6	0	5	3
Carnal Abuse/Rape/Indecent Assault/Buggery	175	8	185	3	172	5
Robbery/Robbery with Aggravation/Burglary/Larceny/Break-in	343	27	204	10	223	11
False pretences/Fraudulent conversion/Forgery	4	0	5	1	8	1
Unlawful Possession/Receiving stolen property	21	0	41	3	17	2
Wounding/Assault/Assault occasioning bodily harm	725	189	468	146	276	61
Dangerous Drugs	553	24	311	14	181	15
Breaking Firearm Law/Armed with offensive weapon/Shooting with intent	276	24	160	20	158	18
Arson/Malicious destruction	73	12	60	11	32	11
Breaking Road Traffic Law	36	2	57	2	50	4
Minor and other offences ^a	264	51	63	28	28	4
ORDER						
Breach of Probation Order/Variation Order/Supervision Order	17	21	24	13	28	7
OTHER						
Care and Protection/Child Abandonment/	349	478	328	390	300	324
Uncontrollable Behaviour/Disorderly conduct	174	186	150	147	154	170
GRAND TOTAL	3 017	1 023	2 062	788	1 562	631

a - 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 3 511 new non-custodial cases (2 612 adults and 899 juveniles). Approximately 86.2 per cent of the clients were male. Of all new cases, 42.8 per cent was for Probation Orders; 37.4 per cent was adults on Community Service Orders; and 11.2 per cent was adults on Suspended Sentence Supervision Order (Table 24.17). A total of 3 783 non-custodial cases were completed during the year; 2 606 satisfactorily and 1 177 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: Malfunctioning Families (18.9 per cent), Unsatisfactory Behaviour of Parent/Guardian (18.0 per cent) and Uncontrollable Child (17.9 per cent). However, “Other” remained the largest category with 38.6 per cent. The number of investigations conducted by Probation After-care Officers decreased by 2.7 per cent to 11 212 (Figure 24G).

INITIATIVES

A number of initiatives were undertaken to improve the functioning of the DCS and the rehabilitation programme for both juvenile and adult offenders. These included:

- Implementation of a Suicide and Self Harm Plan for adult and juvenile institutions
- Implementation of a rehabilitation programme for short-term inmates
- Reclassification and transfer of 877 inmates from maximum security to medium/low security institutions as a population reduction strategy
- Upgrade of the security of Tamarind Farm Adult Correctional Centre
- Upgrade of surveillance cameras (CCTV)
- Improvement of the lighting system throughout the institutions
- Replacement of the brake system to an individual locking system
- Conducting of at least one fire drill per quarter in all institutions
- Training of 49 new Correctional Officers to be stationed at juvenile centres
- Renovation of five classrooms at Tower Street Adult Correctional Centre (TSACC)
- Use of the TSACC for the first time in 2014 as an examination centre for the CSEC examinations

TABLE 24.17
NON-CUSTODIAL SENTENCES BY PARISH AND SEX (NEW CASES), 2014

	Suspended										Grand Total						
	Probation		Supervision		Community		Correctional		Sentence Sup.			Other ^a Juveniles/Adults					
	Juveniles	Adults	Juveniles	Adults	Order	Order	Juveniles	Adults	Parole	Adults							
M	F	M	F	M	F	M	F	M	F	M	F						
Family Court	154	27	5	2	13	4	4	7	19	2	1	0	0	0	4	2	244
Lockett Avenue	6	0	138	35	0	0	213	44	1	0	32	6	23	1	1	0	500
Portmore	22	1	36	7	0	0	55	11	10	0	10	1	4	1	0	0	158
St. Catherine	35	7	51	14	0	0	76	10	0	0	21	3	12	1	0	0	230
Clarendon	40	1	89	18	1	0	107	8	4	0	15	2	6	1	2	1	295
Manchester	37	11	67	13	1	1	165	9	3	1	70	6	4	0	2	0	390
St. Elizabeth	27	1	63	6	2	1	145	9	4	0	35	0	4	0	2	0	299
Westmoreland	53	6	22	6	6	0	24	10	15	3	9	4	2	0	3	0	163
Hanover	38	4	17	4	14	1	35	6	11	1	10	2	2	0	2	2	149
St. James Family Court	70	13	4	1	13	1	0	0	17	0	0	0	0	0	2	1	122
Barnett Street	4	1	20	9	1	4	47	14	0	0	38	3	6	1	3	0	151
Trelawny	17	6	44	11	1	1	43	9	2	0	37	5	0	0	0	0	176
St. Ann	24	2	29	2	2	3	18	7	11	0	17	2	9	0	2	0	128
St. Mary	8	1	12	5	4	2	83	6	1	0	7	2	0	0	2	0	133
Portland	29	4	30	7	8	1	40	1	0	1	14	1	2	0	0	0	138
St. Thomas	29	2	41	13	0	0	96	12	0	0	32	7	0	0	3	0	235
Total	593	87	668	153	66	19	1 151	163	98	8	348	44	74	5	28	6	3 511

a - includes Voluntary supervision/ aftercare/state supervision, aftercare/juvenile and adult institutions and licence for adults and juveniles

M - Male

F - Female

Source: Department of Correctional Services

TABLE 24.18
PERSONS SEEKING ASSISTANCE, 2010–2014

Nature of Case	2010	2011	2012	2013	2014
Uncontrollable Child	1 062	855	583	481	378
Absent Parent/Guardian	146	77	75	36	20
Parent/Guardian's Incapacitation	130	69	25	37	11
Unsatisfactory Behaviour of Parent/Guardian	988	729	504	417	379
Malfunctioning Family	855	440	475	337	398
Legal Assistance	119	61	96	57	55
Multiple	298	236	115	105	57
Other	1 558	1 000	1 190	835	814
Grand Total	5 156	3 467	3 063	2 305	2 112

Source: Department of Correctional Services

- Exposure of 224 short-term inmates at TSACC to Life Skills training
- Introduction of the Alternative Secondary Transitional Education Programme (ASTEP) Curriculum at the Rio Cobre Juvenile Correctional Centre
- Certification of 63 inmates by Heart Trust/NTA
- Assessment and certification of 19 wards at the Hilltop Juvenile Correctional Centre by HEART Trust/NTA in carpentry and general construction
- Development of an aquaponic project for wards at Metcalf Street Secure Juvenile Remand Centre
- Provision of health, counselling and training services to wards and inmates by a number of organizations. This included training in life skills, barbering, art and craft, and horticulture to wards at Hill Top Juvenile Correctional Centre and training in home economics and cosmetology for wards at South Camp Juvenile Correctional Centre.

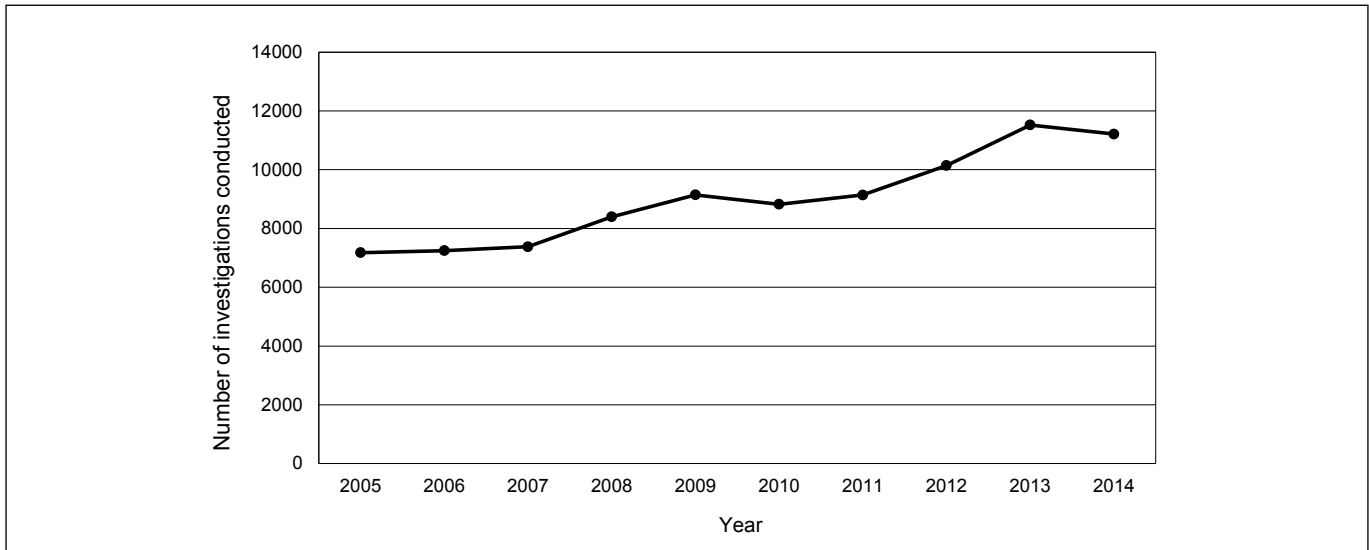


FIGURE 24F: OCCUPATIONAL STATUS OF NEW ADMISSIONS TO CORRECTIONAL CENTRES, 2014

CORRECTIONAL SERVICE PRODUCTION COMPANY LIMITED (COSPROD)

COSPROD continued to deliver on its mandate to rehabilitate the inmates of the adult penal institutions through skills training and exposing inmates to the discipline of regular work. Training was provided for 95 inmates daily. During the period under review, over \$8.79 million of revenue was generated and just over \$1.36 million was paid to inmates upon release. A slaughter house, pig pens and the sales office at Tamarind Farm Adult Correctional Centre were renovated, while the freezer container was repaired. Additionally, there was the computerization of the three Sales Offices with the Point of Sales System. The main challenges facing COSPROD were: shortage of Correctional Officers to supervise training of inmates in the production segments; inadequate budget; slow cash flow; and inadequate hours worked by inmates each day.

JUSTICE

The Courts

With 1 364 appeals carried forward from previous years and 271 new appeals filed, the total caseload heard by the **Court of Appeal** was 1 635 (Table 24.19). Of this, 57.1 per cent was related to civil matters and 42.5 per cent criminal matters. A total of 1 431 cases (1 221 traversed and 210 new) originated from the Supreme Court and 204 cases (143 brought forward and 61 new) originated from the **Resident Magistrates (RM) Court**. Of the total cases listed, 247 cases (15.1 per cent) were disposed of. Some 87.2 per cent of appeals disposed originated in the Supreme Court, while 12.8 per cent of matters were from the RM Court. At the end of the year, 1 388 appeals remained pending. Cases listed for hearing in the island's Resident Magistrate (RM) Courts during the year was 576 334 (Table 24.20). Of this number,

TABLE 24.19
CASES IN THE COURT OF APPEAL, 2014

Category	Supreme Court			Resident Magistrate			Total
	Civil	Criminal	Miscellaneous	Civil	Criminal	Miscellaneous	
Pending Appeals as at December 2013	746	470	5	47	96	0	1 364
New Appeals Filed	104	105	1	37	24	0	271
Total Appeals Listed	850	575	6	84	120	0	1 635
Disposal of New Appeals Filed	11	1	0	9	11	0	32
Disposal of Pending Appeals	101	73	1	22	18	0	215
Total Appeals Disposed	112	74	1	31	29	0	247
Appeals Pending at December 2013	738	501	5	53	91	0	1 388

Source: Ministry of Justice, Court Statistics

TABLE 24.20
CASES IN THE RESIDENT MAGISTRATES' COURT, 2014

	Brought Forward	Cases Filed	Total Cases Set for Trial	Disposed of	Pending
Criminal					
Preliminary Exams	6 441	4 993	11 434	3 669	7 765
Indictment	9 088	29 745	38 833	20 992	17 841
RM Summary	14 135	34 875	49 010	26 633	22 377
Petty Sessions	8 623	16 371	24 994	14 963	10 031
Traffic	5 676	300 751	306 427	95 855	210 572
Tax Cases	85 802	4 611	90 413	3 405	87 008
Sub total	129 765	391 346	521 111	165 517	355 594
Civil					
Plaints	3 853	20 176	24 029	16 214	7 815
Family	466	5 423	5 889	4 978	911
Judgement Summons	9 641	4 371	14 012	3 838	10 174
Probates and Administration	912	383	1 295	330	965
Sub total	14 872	30 353	45 225	25 360	19 865
Coroners	461	628	1 089	442	647
Western Family Court					
Criminal Cases	568	1 574	2 142	1 712	430
Civil Cases	1 126	5 641	6 767	5 338	1 429
Grand Total Cases	146 792	429 542	576 334	198 369	377 965

Source: Ministry of Justice, Court Statistics

74.5 per cent (429 542 cases) was filed during the period under review. The majority of the cases listed for hearing (90.4 per cent) was related to criminal matters. Traffic cases continued to contribute to the high number of new cases listed. Approximately 31.8 per cent of criminal cases and 56.0 per cent of civil cases were disposed. Overall, the disposal rate at the island's RM Courts was 46.2 per cent. A total of 377 965 cases, including a number of traffic matters (57.7 per cent), remained pending at the end of the year. The **Family Courts** heard 8 909 matters. Most of the matters heard related to Maintenance (41.4 per cent), while adoption issues continued to be the least number of matters heard (0.2 per cent). The **Gun Court Division of the Corporate Area RM Court** had 339 cases listed for hearing, with 218 brought forward from previous years. A total of 51 cases were disposed of, with 26 by "Voluntary Bill". At the end of the year, 288 cases were carried forward. A total of 496 cases were listed in the **Western Regional Gun Court**, of which 215 were disposed. The **Night Court** continued to assist in clearing the case backlog. A total of 42 052 cases were filed for the period, of which 26 513 (63.1 per cent) were disposed. St. James was the parish with the largest number of cases (9 550) filed and Kingston and St. Andrew the least (1 707). Westmoreland had the highest disposal rate (79.5 per cent), while St. Ann had the lowest (42.8 per cent).

JUSTICE SECTOR REFORM

The reform of Jamaica's justice system is the overarching priority as recommended by the Jamaica Justice System Reform Task Force 2007 Report. The priority policies/programmes/projects are planned and developed, taking into consideration Vision 2030 Jamaica, the Medium Term

Economic Programme and the Medium Term Socio-Economic Policy Framework 2012–2015. 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:
 - Administration of Citizen's Scorecard Instrument and Household Survey to 932 court customers from across 28 courts islandwide and 124 customers of the Criminal and Civil Justice Administration, Dispute Resolution Foundation, Legal Aid Council and Clinics, and the Victim Services Division. The instrument was used to assess the impact of the justice reform agenda.
 - Implementation of the Communication Strategy which included consultation and sensitization sessions on justice reform issues among various stakeholders, development of public education materials, publication of articles and attendance at expositions and community forums.
 - Development of a comprehensive Justice Sector Reform Implementation Plan to guide wider justice sector reform and modernization.

Justice sector reform activities were also carried out in partnership with the following justice related entities:

- *Office of the Director of Public Prosecutions:*
 - Development of a Standards of Professional Conduct for Prosecutors and Clerks of Courts
 - Development of human resources protocols and review of the organizational structure, and deployment of human resource management in the Office of the Director of Public Prosecutions
 - Development of Knowledge Management Tools
 - Development of a Prosecutor’s Manual
 - *Office of the Parliamentary Counsel:*
 - Development of a Legislative Policy Manual and a Drafting Manual for the Office of the Parliamentary Counsel which will increase capacity, uniformity and timelines in these areas and accelerate the modernization of Jamaica laws.
 - *The Courts:*
 - Training and Professional Development Programme for court personnel developed
 - Specialist Court Management and Court Administration experts hired
 - Information, education and communication material developed on court reforms
 - Recommendations for improving RM Court related Intake Practices from Police Officers
 - Timely Judicial Decisions, Cases and Case Flow Management, Library and Materials developed for 2015 implementation
 - Desktop computers and scanners were purchased to improve the service delivery capabilities of the Court.
 - *Drafting and Law Reform:*
 - Induction Training Manual for legislative drafters completed
 - Core competences (including performance standards) for OPC personnel reviewed and revised
 - Knowledge Management tools acquired to support legislative reform and drafting services.
 - *Legislative Policy:*
 - Core Competency Standards for Legal and Policy Officers in Line Ministries developed and administered
 - Professional Development Training delivered to Legal and Policy Officers in MOJ and other ministries
 - Social Context Training (including gender equality, gender sensitivity and youth empowerment issues) delivered to male and female legal officers and policy officers
 - IEC material developed on Legislative Reforms
 - Organizational Structure of the Attorney General’s Department reviewed.
2. **Establishing a Sound Court Infrastructure** – In accordance with the objective of establishing a Sound Court Infrastructure, Justice Square in Downtown Kingston, Public Building North and East (Supreme Court and Old NCB Building) was completed in October. Repairs and maintenance were conducted on the following courts: the Lucea Family Court, and the RM Courts in Port Antonio; Mandeville; Cross Keys; Cottage; Balaclava; Santa Cruz; Lucea; Cambridge; Ramble; Claremont; Browns Town; and May Pen. Emergency electrical and plumbing works were also carried out on the Lucea Family Court, the Corporate Area Civil Court, and the Lucea and Port Antonio RM Courts.
 3. **Restorative Justice (RJ)** – provides a holistic alternative to addressing crime and its impact by offering opportunities for justice interventions that seek to correct the harm caused by an offence/crime in select at-risk communities. There was a 60.0 per cent increase intake for community case referrals. Seven sensitization workshops were held at the Tower Street, Fort Augusta and St. Catherine Adult Correctional Centres. Some 100 candidates were screened and interviewed for training in RJ. Additionally, the programme was expanded to include 10 additional communities and a new RJ centre opened at Overton Plaza in Montego Bay, St. James.
 4. **Human Rights** – priority actions to be pursued include the establishment of a national human rights institute (NHRI); and the development and delivery of human rights courses for Judges, Resident Magistrates, staff of the Office of the Director of Public Prosecutions and members of the Jamaican Bar Association. Dialogue was held with the Human Rights Unit

of the Commonwealth Secretariat to assist with the preparatory work to establish a NHRI. Phase 1 commenced as an audit phase, with information being captured from across MDAs and research conducted on the various models of NHRIs in other jurisdictions.

- 5. Management Information Systems (MIS)** – The Manchester, St. James, Clarendon, Westmoreland, Portland, Hanover, St. Elizabeth and St. Mary RM Courts were configured with wireless internet capability to facilitate remote access to electronic case files by crown counsel. The installation of ICT Network Infrastructure was undertaken at the newly completed Justice Square, Public Building North and the Montego Bay Satellite Registry to facilitate the integration of technological systems in these newly established Court facilities. A total of 25 steno writing machines were deployed to the Supreme Court to facilitate real time transcription, and facilitate faster turnaround of court transcripts. One courtroom at the Corporate Area Criminal Court was outfitted with video link technology to facilitate remote evidence in court as per the Evidence (Special Measures) Act, 2012. Additionally, the Office of the Trustee in Bankruptcy’s website was developed and launched to increase the office’s online presence.

The **Victim Services Division (VSD)** offers a number of services including counselling, emotional support, court support, various programmes of therapeutic intervention and other technical services. The Division served 12 297 clients (5 145 new and 7 152 follow-up clients). Of these new clients 75.6 per cent was female. Approximately 37.2 per cent of the new females who sought the assistance of the VSD were in the 12–18 age group followed by 18.2 per cent in the 30–44 age group. The main categories of offences for which clients sought the services of the VSD were: Rape, 12.1 per cent; Domestic Violence, 9.8 per cent; Indecent Assault, 7.6 per cent; Sexual Intercourse with a minor under 16 and Behavioural Problems, 7.2 per cent each; Wounding, 6.6 per cent; and the category “Other”, 29.1 per cent. There were 7 cases of human trafficking/suspected human trafficking. Additionally, 1 955 children (1 620 females) benefited from the VSD’s Children in Court programme which aims to reduce the level of trauma experienced by children who interface with the Justice system. In an effort to increase public awareness on victim support issues and services, 947 promotional meetings were held with 19 711 attendees.

During the period, the **Justice Training Institute** conducted 33 training sessions with over 848 participants. Training programmes included: qualifying training for Justices of the Peace; Performance Management Appraisal System; Diploma in Paralegal Studies; CXC English Language and Mathematics; Introductory Computer Application; Diploma in Court Reporting; and High Court Judges and RM Orientation. Some 307 persons participated in the JP qualifying training sessions and 60 in the JP specialized training sessions. Twelve

persons participated in the Diploma for Paralegal Studies programme and another 11 persons in the Court Reporting training programme. Some 378 persons participated in the Judicial Education and Training Seminar.

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. During the period, 1 691 persons received complete representation via the legal aid system. From the RM Court, 887 cases attained completion; for the Gun Court, 276 cases; for the Circuit Court, 503 cases; and 25 cases for the Court of Appeal. Some 2 633 persons in police custody obtained legal representation including Question and Answer sessions, Identification Parade, station bail applications, filing of Habeas Corpus writs and Court bail applications. As at November 26, there were 475 Attorneys empanelled to the Council. Of the \$60 360 000.00 allotted in the budget, a total of \$26 883 620.00 was paid to attorneys who provided legal aid services. The Council embarked on a three-month public education programme to sensitize the population on the availability of legal representation through legal aid and how to access it. The Continuing Legal Professional Development (CLPD) programme was held five times during the period and was geared towards Duty Counsel/empanelled lawyers to understand “The Role of Counsel: Ethics and Procedure” in legal aid matters. Additionally, a newly revised Means Test Assessment was added to FORM C to ascertain the ability of persons to contribute to their legal fees and how much they may be required to pay.

The **Office of the Trustee in Bankruptcy (OTB)** is mandated to administer the affairs of insolvent persons and companies in accordance with the provisions of the Bankruptcy and Insolvency Act, 2014 and the Companies Act, 2004. Over 50 persons were interviewed for bankruptcy, 18 new bankruptcy orders were obtained and proposals were sent to creditors on behalf of 13 debtors, of which 9 were accepted. No bankrupts were discharged or companies dissolved. The OTB’s income was \$6.56 million and dividend totalling \$7.1 million was paid out in relation to eight matters. Approximately \$102.1 million in new funds was invested in several financial institutions on behalf of insolvent estates and companies during the year. At the end of the year the office held investments in excess of \$351.0 million, from which future dividends are to be paid. During the period, the Laws of Jamaica were updated to ensure completeness and accuracy. A public education initiative aimed at increasing the public’s awareness of the office and its services was implemented. Due to inefficiencies in the office’s operations as a result of problems with the management of records and information, a records and information management project was developed and implementation commenced in September.

The **Criminal and Civil Justice Administration Division (CCJAD)** received 9 967 Marriage Licence applications, of which 77 were carried forward from the previous year. Some 9 749 licences were processed, contributing approximately

\$39.0 million in Stamp Duty to the consolidated funds, while 104 licences were returned for corrections and 191 carried forward to 2015. The Criminal Records (Rehabilitation of Offenders) Board reviewed 1 374 applications for Expungement of criminal records. Of this number, 743 were new applications, while the other 631 were for final decisions. Of the 631 submitted for final decisions, 513 were approved, 54 returned for ineligibility/incompleteness/additional information, 38 deferred to another date and 26 refused. A total of 416 new Justices of the Peace (218 females) were commissioned from 9 parishes, bringing the complement of Justices of the Peace islandwide to 6 316.

The **Documentation, Information and Access Services received** and processed 39 applications that were in compliance with the Access to Information Act, 2002. There were 21 applications from media houses, 12 from members of the public and 6 from organizations. Of the applications processed, 13 were transferred to other public authorities; 10 were granted full access; 4 carried forward to the next year; 3 abandoned by the applicants; 3 treated as general requests for information with the documents being already in the public domain; 2 granted partial access; for 2 no documents existed in support of the request; 1 contained exempt materials; and 1 was denied.

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 Employment (Flexible Work Arrangements) (Miscellaneous Provisions) Act 2014
- The Criminal Justice (Suppression of Criminal Organizations) Act 2014
- The Criminal Records (Rehabilitation of Offenders) (Amendment) Act 2014
- The Disabilities Act 2014
- The Insolvency Act 2014

Subsidiary Legislation

- Administrator-General (Fees) (Amendment) Regulations

INPUTS FROM SELECTED GOVERNMENT AND NON-GOVERNMENTAL ORGANIZATIONS

Some 1 028 complaints were received by the Independent Commission of Investigations (INDECOM), a 66.6 per cent increase compared with the previous year. The main authorities against whom the complaints were made included: JCF, JDF, DCS and the Transport Authority. The major categories for complaints were: assault (26.9 per cent), conduct unbecoming

(13.1 per cent), fatal shootings (11.2 per cent), shooting injury (9.2 per cent), abuse of office (7.0 per cent) and discharge of firearm (6.5 per cent). There were 129 fatalities; 115 shooting deaths, 11 deaths in custody at a police station, 2 automobile collisions and 1 death by poison. A total of 745 cases were investigated and 220 disposed of.

OUTLOOK

The achievement of Goal 2 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 CSJP III will commence and a key component of this phase will be the monitoring and evaluation framework. The MNS will continue to guide the implementation of the National Crime Prevention and Community Safety Strategy, and provide the policy framework to facilitate a continued reduction in the incidence of crime and violence.

Justice sector reform will continue to be the focus of the MOJ. Implementation of the Justice Security Accountability and Transparency (JSAT) project is set to commence with the engagement of a project team to coordinate the implementation of the schedule of activities. A monitoring and evaluation framework for the Justice Sector is to be developed and implemented in the ministry and a number of its key agencies. Additionally, rules of criminal procedures for the Resident Magistrate and Supreme Courts are to be developed. Draft Legislation being examined for 2015 include:

1. Bills:

- Law Reform (Notice of Alibi) Bill
- Law Revision (Amendment) Bill
- Jury (Amendment) Bill
- Dangerous Drugs (Amendment) Bill
- Judicature (Resident Magistrate) (Amendment) Bill
- Strategic Framework for Court Management Services
- Judicature (Supreme Court) Act
- Judicature (Resident Magistrate) Act
- Administrator-General's (Fees Collection) (Validation and Indemnity) Bill

2. Subsidiary Legislation:

- Evidence (Special Measures) (Video Recorded Evidence) (Criminal Proceedings) Regulations
- Dangerous Drugs (Amendment) Regulations. ■

SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE

INTRODUCTION

In the face of challenging global dynamics and constraints on public spending, government remained committed to social development goals articulated in the Vision 2030 Jamaica – National Development Plan, and the complementary Growth Inducement Strategy. This commitment embraced the maintenance of standards already achieved in social dimensions such as health, education and training, and social welfare; additionally, efforts to advance the enabling environment for attainment of further progress were a priority. The government continued to engage with critical local and international stakeholders and partners in the identification and allocation of required resources, and in the promotion of counterpart support. Significant strides were made in the areas of legislative and policy reviews, operational improvements to programme implementation, project identification and design, creation of inclusive policy environments and the enhancement of service delivery. This chapter reviews major initiatives in social development, social protection and culture over the year.

Vision 2030 Jamaica remained the framework for social policy, and as such, the attention to vulnerable population groups was a distinct objective. The status of children, youth, women, senior citizens and persons with disabilities was emphasized as imperatives for human development. In preparation for the culmination of the Millennium Development Goals, and the establishment of the Post-2015 Development Agenda, Jamaica participated in local, regional and international fora to arrive at global consensus on priority social, environmental and economic development dynamics. Extensive stakeholder involvement was coordinated by the Planning Institute of Jamaica (PIOJ), and the Ministry of Foreign Affairs and Foreign Trade, and saw the input of a range of Ministries, Departments and Agencies (MDAs). Priority local themes for Post-2015 were underscored as the eradication of poverty, broader social protection coverage, education and health outcomes, environmental resilience and climate change adaptation, and sustainable cities, among others.

Work on the review of legislation was advanced in the areas of child protection and adoption, with wide stakeholder input.

An extensive review of the National Youth Policy continued. Various state and non-government agencies supported the thrust for youth development, and the areas of specific focus included citizenship and participation, employment, youth leadership, governance and advocacy. The Disabilities Bill was passed in the Parliament in October, and work began on articulating the requisite regulations to manage its implementation. In partnership with the Jamaica Council for Persons with Disabilities, several stakeholders participated in advocacy, information-sharing, and awareness events with the disability community. Programmes to integrate the contribution and input of the elderly continued to be managed through the National Council for Senior Citizens network islandwide. The input of non-governmental organizations and the private sector continued to support interventions for these vulnerable populations.

Jamaica marked a milestone in its social policy history with the completion of the country's first comprehensive Social Protection Strategy (SPS). Approved by Cabinet in March, the SPS was launched in July by the Planning Institute of Jamaica. The Strategy seeks to streamline and structure state and non-state social protection initiatives towards a goal of providing inclusive interventions to mitigate various life risks, and to build income security. The SPS becomes the basis for social protection services in the country, with a supportive institutional mechanism being established at central and local levels. Work on development of the SPS was funded through the GOJ/World Bank Social Protection Project 2008–2013, executed by the Ministry of Labour and Social Security (MLSS).

Other significant social protection advances included the approval of reforms to public service pension administration and the drafting of a School Feeding Policy. Supported by the World Bank and the Inter-American Development Bank (IDB), several projects to foster and improve the inclusion of persons with disabilities into mainstream society continued to be implemented.

Addressing gender-based violence and discrimination, and the mainstreaming of gender perspectives in policies and programmes continued to be the main focus of the government and its partners. Community development as a

plank of the country's growth agenda was centred on poverty reduction and the strengthening of social systems, typically through improvements to social and economic infrastructure, and the building of social capital. Within a context of local government reform, focus was on enhancing participatory governance structures.

FINANCING¹

Select social development, social protection and cultural programmes accounted for a total of \$26.7 billion for the fiscal year (FY) 2014/15, as reflected in the Recurrent and Capital B budgets² of the Government of Jamaica (GOJ). This allocation represents a \$2.0 billion increase compared with the previous FY³ (Table 25.1).

The Child Development Agency (CDA) was allocated \$1.8 billion towards the fulfilment of its mandate. Of this amount, \$825.2 million was apportioned to Children's Homes, of which 81.7 per cent was to private children's homes; \$374.3 million to Places of Safety, of which 13.0 per cent was allocated to private Places of Safety; and \$95.2 million to the Foster Care programme. The remainder (\$548.9 million) was allocated to the CDA for Direction and Administration. A total of \$63.0 million was allocated to the Ministry of Youth and Culture (MYC) for the Office of the Children's Registry (OCR). The MYC also received an allocation of \$9.1 million for the operation of its newly established Children's Affairs Division. The Office of the Children's Advocate (OCA) received an allocation of \$112.6 million.

A total of \$4.3 billion was allocated to Student Nutrition in the Ministry of Education's portion of the Recurrent Budget. An additional \$6.6 million was allocated to student nutrition in the Capital B budget under the IDB supported School Feeding Modernizing Programme. The Early Childhood Commission was allocated \$15.0 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 \$17.5 million for Early Childhood Development under the Recurrent Budget.

The MYC received \$126.3 million for youth development in the Recurrent Budget. This represents an increase of \$16.7 million compared with the allocation in the previous year. Included in this allocation was: \$87.7 million for the National Centre for Youth Development; \$7.5 million to Operation Phoenix for the management of Youth Information Centres; a \$16.0 million grant for the Possibility Programme for street boys; and an \$8.0 million grant for private social

services youth organizations. The remainder (\$7.0 million) was allocated for support to the Association of Boys and Girls Brigades, Young Men Christian Association, Young Women Christian Association and Girl Guides to assist with operating expenses. The National Youth Service received an allocation of \$406.8 million for training under the MYC's budget. An additional \$173.7 million was allocated in the Capital B Budget to the IDB-supported Youth Development Programme. A grant of \$200.2 million was allocated to the Jamaica 4-H Clubs for youth development initiatives under the Ministry of Agriculture and Fisheries (MOAF).

Approximately \$191.0 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) {\$54.1 million} and its Non-governmental Organization (NGO) partners (\$4.8 million); as well as the Women's Centre of Jamaica Foundation (\$132.1 million).

The Ministry of Local Government and Community Development (MLGCD) received an allocation of \$44.6 million from the Recurrent Budget for social protection and community development programmes. Poor Relief Services, including allocation to the Board of Supervision received \$21.7 million for the operation of infirmaries; and the Homeless (Street People) Programme, \$22.9 million. An additional \$2.6 billion was apportioned for Local Government Administration under the Recurrent Budget and \$25.0 million under Capital B. Allocations for community development services included: \$5.8 billion under the Recurrent Budget and \$86.2 million under the Capital B Budget. The Social Development Commission was allocated a total of \$722.5 million for community development services, an increase of \$49.7 million compared with the previous FY. The Jamaica Social Investment Fund (JSIF), an agency of the Office of the Prime Minister, received \$1.4 billion (Capital B), a reduction of \$0.5 billion, to support community-based poverty alleviation interventions. The Ministry of Finance and Planning (MOFP) received \$10.0 million for grants to voluntary social services NGOs (United Way of Jamaica and the Council for Voluntary Social Services).

An allocation of approximately \$1.7 billion was made to the Ministry of Labour and Social Security (MLSS) for Social Security and Welfare Services under the Recurrent Budget. This allocation includes \$457.0 million to the National Insurance Scheme (NIS) for its modernization and administration; \$44.8 million to the Early Stimulation Programme for children 0 to 6 years with disabilities; and

1. Source: Estimates of Expenditure for Financial Year Ending March 31, 2015 (as Passed by the House of Representatives).
2. The selected items previously reflected in the Capital A Budget were transferred to the Recurrent Budget in keeping with the commitment to strengthen the public investment management system.
3. Revised estimates

TABLE 25.1
SOCIAL DEVELOPMENT, SOCIAL PROTECTION AND CULTURE RECURRENT AND CAPITAL BUDGET
BY PROGRAMME, 2013/14–2014/15
(\$'000)

PROGRAMME	REVISED ESTIMATE 2013/2014	ESTIMATE 2014/2015
RECURRENT		
Ministry of Youth and Culture		
Art and Culture (promotion of)	796 145.0	810 135.0
Youth Development Programme ^a	109 573.0	126 287.0
National Youth Service	406 794.0	406 794.0
Child Development Agency ^b	1 843 190.0	1 845 872.0
Office of the Children's Registry ^c	61 832.0	63 000.0
Children Affairs	-	9 126.0
Office of the Prime Minister		
Social Welfare Services (Women's Welfare)	201 349.0	191 045.0
Ministry of Labour and Social Security		
Social Security and Welfare Services ^d	1 720 236.0	1 713 087.0
Office of the Children's Advocate	97 686.0	112 585.0
Ministry of Education		
Student Nutrition	3 969 551.0	4 286 600.0
Social and Economic Support Programme	8 000.0	8 000.0
Ministry of Local Government and Community Development		
Social Welfare Services ^e	40 335.0	44 616.0
Social Development Commission	672 839.0	722 524.0
Social Security and Welfare Services ^f	526 268.0	569 448.0
Local Government Administration	2 643 030.0	2 586 309.0
Community Development	4 398 629.0	5 809 038.0
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)	208 708.0	200 195.0
Ministry of Health		
Early Childhood Development	19 285.0	17 500.0
SUBTOTAL RECURRENT	17 733 450	19 532 161
CAPITAL B		
Ministry of Labour and Social Security		
Social Security and Welfare Services ^g	4 688 362.0	5 524 504.0
Ministry of Youth and Culture		
Youth Development	203 905.0	173 678.0
Ministry of Education		
Early Childhood Development (Early Childhood Commission) ^h	32 000.0	15 000.0
Student Nutrition ⁱ	18 100.0	6 625.0
Office of the Prime Minister		
Jamaica Social Investment Fund (JSIF)	1 905 330.0	1 370 730.0
Ministry of Local Government and Community Development		
Local Government Administration	11 230.0	25 000.0
Community Development	64 387.0	86 243.0
SUBTOTAL CAPITAL B	6 923 314	7 201 780
GRAND TOTAL	24 656 764	26 733 941

a - Grants to National Centre for Youth Development, Operation Phoenix, and Private Youth Organizations

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 - Provision to Social Protection programmes including PATH and Steps-to-Work (IBRD and IDB supported projects)

h - Early Childhood Development Project (IBRD)

i - School Feeding Modernizing Programme (IDB)

Source: Estimates of Expenditure for Financial Year Ending March 31, 2014 (as Passed by the House of Representatives)

\$245.8 million to Direction and Administration of public assistance services. The \$1.7 billion allocation to the ministry also includes grants to:

- Parish Council for Poor Relief Services (\$293.4 million)
- National Council for Senior Citizens (\$72.2 million)
- Jamaica Council for Persons with Disabilities (\$78.0 million)
- Rehabilitation Grant Programme (\$214.4 million)
- Abilities Foundation (\$9.6 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 (\$283.1 million).

A combined allocation of \$5.5 billion was made to the MLSS under the Capital B budget 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 II (World Bank), \$5.3 billion
- Support to Improve the Lives of Persons with Disabilities Project (IDB), \$30.0 million
- Social and Economic Inclusion of Persons with Disabilities Project (World Bank), \$40.0 million
- Integrated Social Protection and Labour Programme (IDB), \$154.3 million.

A provision of \$810.1 million was allocated to the MYC for the promotion of Arts and Culture, an increase of \$14.0 million compared with the FY 2013/14 allocation. Of this amount, \$331.7 million was allocated to the Institute of Jamaica; \$307.2 million was apportioned to the Jamaica Cultural Development Commission (JCDC); and \$168.3 million went to the Jamaica National Heritage Trust. Of the amount allocated to the JCDC, approximately \$83.8 million was for the development and promotion of cultural programmes.

CHILDREN (0 to under 18 years)

There was an estimated 811 200 children (412 300 boys) in the population, which represents approximately 29.8 per cent of the total population. The protection of the rights of children was continued by the government with support from its various partners at the national, regional and international levels. A number of legislation, policies and programmes were developed, implemented, or sustained in an effort to promote the optimal development of children (see also

chapters on Education and Health). The Ministry of Youth and Culture (MYC) continued to oversee the children portfolio and worked closely with its agencies, other MDAs, and non-government partners in fulfilling its mandate.

Policy, Legislation and Research

The CDA in collaboration with various partners continued to spearhead **policy and legislative review** of major child-focused policies during the year. A policy paper to amend the Child Care and Protection Act 2004 (CCPA) and the Children's Homes Regulations was finalized and submitted to the MYC. The finalization of the policy paper was guided by inputs received from a series of focus group sessions with key sector groupings, regional stakeholder consultations comprising children and adults, as well as an individual expert session in which over 700 individuals participated. The draft final document was presented at two national consultations involving 275 adults and children who presented their comments and recommendations for consideration. Additionally, the policy paper was distributed nationally through the CDA's website and written submissions were made to all key child-centred MDAs and NGO groupings for their comments which were also used to inform the final paper. The review process was guided by a multi-sectoral Technical Advisory Committee.

The review of the Adoption (Children Of) Act 1958 was advanced with the completion of a series of individual interviews, focus groups, and regional stakeholder consultations in which over 400 individuals (children and adults) participated. Two national consultation sessions were also held involving over 170 persons. A draft final policy paper outlining the recommendations for amendment was submitted to the Adoption Board for its review. The review process was guided by a multi-sectoral Technical Advisory Committee. Both the review of the Child Care and Protection Act and the Adoption (Children Of) Act were funded under the GOJ/ UNICEF Country Programme. Consultation continued on the revised draft of the National Policy on Child Labour, led by the Child Labour Unit of the MLSS.

During the year, a **Children Affairs Division** was established within the MYC. The division is responsible for policy development and the monitoring of programmes for children and adolescents. The work of the division will be guided by relevant policies, legislation and international convention to which Jamaica is a signatory.

The MYC in collaboration with the CDA (an agency of the Ministry) and other partners hosted the UN High-level Round Table Cross Regional Meeting in June. The two-day event involved over 200 representatives from 17 countries and international organizations. This meeting was held under the auspices of the Honourable Minister of Youth and Culture and the Special Representative of the United Nations Secretary General on Violence against Children. During the event, a special meeting of children representatives was facilitated and saw children presenting their concerns and recommendations

on issues such as the need to reduce domestic violence, abolishing corporal punishment in all settings, and protecting children from sexual exploitation.

The MYC and the CDA also collaborated with key stakeholders in preparing Jamaica's Response to the list of queries raised by the United Nations Committee on the Rights of the Child. The CDA facilitated the preparation of Jamaica's 1st to 5th Periodic Report to the United Nations Committee on the Rights of the Child on the country's progress in implementing the provisions of the UN Optional Protocol on the Involvement of Children in Armed Conflict. Cabinet approval was received for the acquisition and implementation of the Child Case Management System (CCMS), which seeks to provide a platform for storing and managing information on children who interface with the child protection system. A Technical Working Committee was established to guide its development. Process reviews and mapping activities were conducted as a precursor to the implementation of the system.

In an effort to improve the child protection system, the sector continued to examine best practice approaches in partnership with international organizations. A team comprising representatives from the CDA and the OCR visited Vancouver, Canada in November to obtain additional information on the CCMS to ensure its suitability. Representatives from the National Task Force Against Trafficking in Persons also represented the GOJ at the Counter Human Trafficking Workshop held in Trinidad and Tobago in April, sponsored by the International Organization for Migration. In May, a team visited Brazil to identify areas for Brazil-Jamaica cooperation on child protection issues, including a model for engaging communities in the implementation and monitoring of relevant child-related programmes.

Research related to issues affecting children continued, with support from NGOs and International Development Partners (IDPs). The Caribbean Child Development Centre (CCDC) continued to contribute to the body of knowledge on issues affecting children through research and training. During the year, CCDC assisted the Jamaica Social Investment Fund (JSIF) with the evaluation of Phase II of the Bridge Jamaica Project. This included a review of research instruments, and conducting focus groups and interviews with the stakeholders of the project. The CCDC also moved into Phase II of the UNESCO commissioned project to support Health and Family Life Education (HFLE) school practitioners, stakeholders and partners. This phase included the continued documentation of good practices in HFLE delivery, sourcing content for the multimedia library, preparing the HFLE website and its launch, and developing a sustainability plan. The CCDC continued to host the secretariat of the Global Child Development Group (GCDG), which is supported by the Bernard Van Leer Foundation. A meeting of the GCDG was held in April, and attended by 14 international delegates. The delegates discussed early childhood development indicators including data from 13 cohorts covering 12 000 children.

Field research activities for the Anti-Bullying research funded by UNICEF were completed and a preliminary report outlining findings was prepared and shared in two regional consultations, with over 75 participants.

The 9th annual Caribbean Child Research Conference (CCRC) was held in November under the theme "Promoting the Rights of Children with Disabilities". 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. Representatives from government, NGOs, schools, and international organizations participated in the two-day conference. 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 issues related to policy, legislation, access to services, mental health, and parenting. Some 330 individuals were registered on the first day of the conference, including 200 students and teachers from secondary level schools. On day two, approximately 430 participants attended, including over 300 students and teachers from secondary and primary institutions. The numbers for both days included children in state care as well as students from schools which cater to children with disabilities. The Outstanding Child Researcher title was awarded to a female student of Denbigh High School whose research paper was entitled "An Investigative Study on Discrimination Experienced by Rastafarian Children Ages 12-16 in a Rural High School in Jamaica". This was Denbigh High's fourth consecutive hold of the title. The top male researcher in the competition was from Wolmer's Boys' School whose research paper was entitled "An Investigation on the Inclusion of Disabled Children in Mainstream Schools". First place in the primary school essay competition was awarded to a male student of Yallahs Primary. The topic for the essay competition was: "What can we do to improve the quality of life of children with disabilities?"

The National Parenting Support Commission (NPSC) in partnership with UNICEF conducted an assessment of parenting in Jamaica, looking specifically at the determinants of parenting within the Jamaican context. The completion of the assessment will assist with the development of the NPSC Strategic Plan and Parenting Programme Quality Assurance Framework. The NPSC also administered a survey to ascertain the various parenting programmes and activities islandwide, with a view to streamlining and coordinating said programmes for greater impact.

The promotion of **Child Participation** continued to be supported by the CDA. The CDA in collaboration with its Children Advisory Panel (CAP) hosted its inaugural National Children Summit which impacted over 650 children, the majority (98.0 per cent) of whom is in the care of the state. The summit was held under the theme "Creating Opportunities for Vulnerable At-Risk Children; Opening Doors to Securing a Brighter Future". During the one-day event, special development sessions targeting children were held in the

areas of robotics; financial planning and money management; musical expressions which taught delegates the craft of music and singing; how to play the drums and keyboard; and writing lyrics. Delegates were also exposed to computer design and building, abuse prevention and child development, play and art expressions and therapy, grooming and personal etiquette. Sessions on better parenting in the twenty-first century, understanding and preventing child abuse, understanding child participation, and personal development were held targeting adults attending the summit.

The OCR appointed nine Child Ambassadors for the period 2014–2016 who commenced service with the OCR in June 2014. The ambassadors (located in Westmoreland, St. James, Trelawny, St. Catherine, Kingston and St. Andrew, St. Mary, St. Thomas, Manchester, and Clarendon) promote the service of the OCR in their various schools and communities and assist the OCR with various public education activities.

During the year, the CDA's Children's Advisory Panel and the OCR Child Ambassadors participated in a number of activities including the following:

- The 2nd Child and Adolescent Forum in Brasilia, Brazil in December. The forum was staged as a part of the 21st Pan American Child and Adolescent Congress by the Inter-American Children's Institute (IIN), and included all members of the Organization of American States (OAS).
- A series of regional consultations for the review of the Children's Declaration⁴, as a precursor to the National Children's Summit. Over 200 children participated in these consultation sessions held islandwide.
- Completion and presentation of its report to the CDA's executive management team on its inspection interaction with residents and staff within the residential child care sector.
- Participation in the Caribbean Child Research Conference.

Programme Delivery

Parenting

The National Parenting Support Commission (NPSC) continued to provide coordination in the area of support to parents. During the year, the NPSC facilitated the implementation of the National Parenting Policy, including raising awareness of parenting issues and creating access to parental support nationally. In order to ensure that the principles and implications of effective parenting are communicated to the public, the NPSC launched its "Effective Parenting

Campaign" in March. The campaign sought to cultivate an environment of positive parenting and targeted all persons who perform a parenting role. The campaigns comprised several communication and outreach activities such as public service announcements, the launch of parenting ambassadors, parenting education sessions, community fora as well as the engagement of fathers. During the year, the Parent Place initiative was strengthened through the participation of 60 schools across three regions within the Ministry of Education. The initiative focuses on improving both the literacy levels of grade one students and the parent-school partnership in communities. Approximately 120 parent engagement activities were implemented, and all participating schools have established libraries in each grade one classroom. Partnerships to support the work of the Commission were established and maintained with MDAs, the private sector and IDPs. In 2014, the Commission received over \$7.3 million in sponsorship and donation to support its activities. National Parent's Month was observed in November. Activities included: the hosting of a parent village in Kingston; parenting workshops and seminars on various issues; and several media interviews.

Early Childhood Development (ECD)

Early Childhood Development which covers children ages 0–8 years old typically covers health, education and early stimulation interventions. The Early Childhood Commission (ECC), an agency of the Ministry of Education, has monitoring and regulatory responsibility for ECD. During the year, the ECC continued its implementation of the 2013–2018 National Strategic Plan (NSP) supported by the GOJ/World Bank Early Childhood Development Project. Focus was given to the areas of teacher training and staff development, inspection and registration of ECIs, and the expansion of existing facilities at the primary level to accommodate children at the early childhood level. The ECC initiated a census of Early Childhood Institutions (ECIs) in 2014 to capture demographic and other information related to ECIs and practitioners (see chapters on Education and Health for additional information on Early Childhood Development).

A \$44.9 million grant for the re-establishment of a model early childhood institution at the CCDC (University of the West Indies, Mona) was received from the Culture, Health, Arts, Sports and Education (CHASE) Fund. The grant is earmarked for infrastructural upgrading, expansion and equipping of the early childhood centre.

Children at Risk

The OCR receives reports of child abuse, then records, assesses and refers them to the CDA, Office of the Children's Advocate (OCA), the Centre for the Investigation of Sexual Offence and Child Abuse (CISOCA), and/or the Organised

4. The Children's Declaration was developed by children of the Caribbean at the 2012 UN Sub-Regional Meeting on Violence Against Children.

Crime Investigations Division (OCID) for investigation and action.⁵ Preliminary data for the period January to March⁶ revealed that the OCR received 3 111 reports, reflecting an increase of 9.0 per cent over the corresponding period in 2013. Of reports received, 74.7 per cent concerned children who were being reported to the OCR for the first time. Of this amount, 54.0 per cent were girls, 44.0 per cent were boys, while the sex of the remaining 2.0 per cent was not disclosed. The most reports during the period were Neglect, Children in Need of Care and Protection, Children Exhibiting Behavioural Problems, and Sexual Abuse. Reports of neglect accounted for 53.0 per cent of all reports received by the Registry, while reports of sexual abuse accounted for 30.0 per cent. Other categories of reports were Physical Abuse (27.0 per cent), Emotional Abuse (15.0 per cent) and Child Labour (4.0 per cent).

The sex distribution of all categories of reports—except for trafficking, sexual abuse, and child labour—were generally evenly distributed. The two reports of trafficking, approximately 90.0 per cent of all sexual abuse reports, and 59.0 per cent of child labour reports had girls as the alleged victims. With the exception of trafficking (which remained unchanged compared with the same period in the previous year) there was a general increase in reports for all major types of abuse. The highest increases continued to be observed in reports of child labour, which rose by 22.0 per cent to 116 compared with the same period in the previous year. Other notable increases were observed in the reports of children exhibiting behavioural problems (21.0 per cent) and reports of neglect (20.0 per cent). The other categories of abuse saw an average increase of 5.0 per cent over the review period. The parishes from which most of these reports were received were Kingston and St. Andrew, Manchester and Westmoreland, accounting for a combined total of 45.0 per cent of reported cases of child labour during the period. During the year, the OCR referred a total of 7 700 reports of child abuse to the CDA for investigation in accordance with the mandate of the Child Care and Protection Act, 2004. The CDA provided an update to the OCR on the status of investigations of some 8 785 cases including backlogged cases.

Preliminary statistics sourced from the Missing Person Monitoring Unit (MPMU) of the Jamaica Constabulary Force (JCF) indicated that during the year 1 984 children (79.0 per cent female) were reported missing. This reflects a 10.0 per cent decline in the number of children reported missing over the same period in 2013. The data also revealed that approximately nine out of every ten children reported missing in the period have since returned home. The number

of children reported as still being missing at the end of December reduced by 214, from the 467 recorded at the end of 2013. Seven children were reported dead, a decline of 50.0 per cent compared with 2013.

A total of 199 persons from five parishes (St. James; Trelawny; St. Ann; St. Catherine; St. Thomas) participated in search and rescue training during April to July. The training sessions were funded by UNICEF under the End the Violence Initiative, coordinated by the OCR. The training was conducted in partnership with the JCF, the Social Development Commission (SDC), the CDA, the Office of Disaster Preparedness and Emergency Management (ODPEM), the Ministry of Local Government and Community Development (MLGCD), the Ministry of Health (MOH), other government agencies and social groups. A Search and Rescue Protocol for Missing Children was developed by the OCR with the assistance of the JCF (Training Branch and the Caribbean Search Centre), the Jamaica Fire Brigade and members of civil society and disseminated. In order for the efficient operation of the Ananda Alert System (AAS), a Memorandum of Understanding was developed and signed with several agencies at a ceremony held in May 2013. In 2014, the partnership was joined by the National Spatial Data Management Division (NSDMD) of the Ministry of Water, Land, Environment and Climate Change; the Ministry of Transport, Works and Housing and the Jamaica Library Service. A workshop to disseminate findings of the Knowledge, Attitude, Practice and Behaviour (KAPB) study on child maltreatment in Jamaica and the launch of the Search and Rescue Protocols were held in September.

The OCR embarked on a public education project during the summer entitled “Pon Di Corna Reasoning”. The aim of the project was to assess the attitudes of citizens regarding issues of child abuse and reporting in Port Royal; educate the citizens about child abuse; and equip them to identify and report child abuse. Community visits were done in collaboration with representatives from the CDA, the Port Royal Citizens Association and the Port Royal Police Division. Representatives from UNICEF, OCA, and the Citizen & Security Justice Programme (CSJP) provided input in the planning phase of the project, led by the OCR. The playing of Public Service Announcements and OCR jingles via a public address system, as well as the dissemination of public education materials were used to educate the public on the types of child abuse and encouraged persons to report known or suspected cases of child abuse to the OCR.

In September, the OCR conducted a workshop in Hanover

5. It should be noted that the OCR receives reports from CDA, OCA, CISOCA and other agencies, which would be reflected in the annual figures for the OCR. As such, the OCR’s figures for January to March would have included reports provided by these agencies.

6. Data for the full year (up to December 2014) were not available.

with approximately 30 service partners to address concerns about the low reporting of child abuse cases and the non-existence of a multi-agency child protection model in that parish. The workshop sensitized the stakeholders on the roles and functions of the OCR, procedures and prescribed format for reporting cases of child abuse and the Ananda Alert system while exploring the benefits of implementing a multi-agency approach to improve child care and protection in Hanover. The workshop influenced the submission of child abuse reports to the OCR's Westmoreland office from some of the stakeholders and requests for the OCR to participate in other public awareness activities.

The OCR facilitated in excess of 250 presentations at locations including schools, children's homes, churches and various other institutions, participated in over 50 interviews, and manned booths at more than 35 venues. These presentations were estimated to have had a reach of approximately 23 000 persons. In September and October the OCR provided training to staff at all five RIU hotel locations in Jamaica, totalling almost 1 700 persons. The training covered issues relating to the role of the OCR, child abuse, missing children and reporting. Public awareness messages were also aired on how to protect children from the various forms of abuse and how persons can make reports to the OCR. Some 25 school tours were conducted geared towards raising the levels of awareness of students, parents/caregivers and teachers about issues relating to child abuse and the Ananda Alert system. With the support of UNICEF, a Communication Strategy consultancy for the OCR was initiated. The aims of the campaign are to educate target audiences about various forms of child abuse and their detrimental impact on children, and to encourage the reporting of child abuse. Based on the findings of the KAPB study previously conducted, the primary target population will be adults and children 10–17 years as a secondary target group. The OCR Volunteer Programme was launched in March with six personnel commencing service.

The programme has seen the organization benefiting from the service of volunteers from tertiary institutions and other suitably qualified persons to assist OCR programmes and activities that have been negatively affected due to human resource and other constraints.

The Centre for the Investigation of Sexual Offences and Child Abuse (CISOCA), a unit of the Jamaica Constabulary Force, received 1 018 reports⁷ concerning children 0–17 years old, the majority (97.3 per cent) being girls. The majority of the reports received pertained to sexual intercourse with a person under 16 years (726) followed by rape (220). Other reported offences were Cruelty to Child (57), Incest (8) and Other Child Abuse Offences (7). Unlike the previous year, there were no reported cases of buggery or abduction. Most of the reported cases of abuse (873) involved girls 11–17 years old; 118 involved girls 0–10 years; 14 regarding boys 11–17 years and 13 regarding boys 0–10 years old. Of the reports concerning boys, 15 were before the court; there were no convictions or disposal. Regarding girls, 305 cases were before the court, 6 convictions made and 10 cases disposed. The Centre conducted 82 presentations to stakeholders including schools, hospitals and NGOs, benefiting over 10 000 participants. A total of 40 multi-agency meetings were held with partners including CDA, OCR, OCA, Victim Support Division, and the Women's Centre of Jamaica Foundation. A total of 17 courses were held for police personnel in regards to sexual offences and child abuse. The courses included sensitization on the Child Care and Protection Act 2004 and the Sexual Offences Act 2011.

The CDA received and processed 4 232 cases (3 148 females) at its Intake Services Desks islandwide. This represents a 25.6 per cent reduction in the number of reports received compared with the previous year. Cases were treated in office; referred to the courts, allied agencies, or partners for psychosocial interventions; or investigated further. Table

TABLE 25.2
INTAKE SERVICES REPORTS RECEIVED AND PROCESSED BY INCIDENT TYPES

Intake Incident Classification	2013			2014		
	Male	Female	Total	Male	Female	Total
Sexual Abuse	102	362	464	41	362	403
Physical Abuse	222	223	445	198	283	481
Child Exhibiting Behavioural Problems	1 508	1 376	2 884	996	956	1 952
Abandonment	23	14	37	13	12	25
Other	686	1 173	1 859	236	1 135	1 371
TOTAL	2 541	3 148	5 689	1 484	2 748	4 232

Note: "Other" comprises cases of neglect, request for financial support or support for accessing other social services, etc.

Source: Child Development Agency

7. The reports do not include CISOCA's rural division.

**TABLE 25.3A
POPULATION OF CHILDREN IN CARE BY REGION AND PLACEMENT CATEGORY FOR
QUARTER ENDING DECEMBER 31, 2014**

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	156	266	178	177	355	291	297	588	51	67	118	201	220	421	107	77	184	938	994	1 932
North East	68	76	144	51	34	85	31	56	87	39	36	75	50	51	101	3	8	11	242	261	503
Western	115	143	258	99	82	181	157	112	269	13	26	39	84	110	194	99	82	181	567	555	1 122
Southern	88	99	187	81	91	172	153	95	248	28	21	49	43	76	119	10	42	52	403	424	827
TOTAL	381	474	855	409	384	793	632	560	1 192	131	150	281	378	457	835	219	209	428	2 150	2 234	4 384

Source: Child Development Agency

25.2 provides the details of the types of reports processed disaggregated by sex of child impacted. The majority of reports continue to be related to Behavioural Problems (46.1 per cent), followed by the category Other, with 29.5 per cent. There were reports of more boys than girls exhibiting behavioural problems. 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 86 such incidents; of which the Southern Region recorded the highest numbers (38).

As at December, a total of 4 384 children (51.0 per cent female) were in the care of the state, representing a decrease of 237 children compared with the previous year (Table 25.3A). The largest proportion of children in state care continue to be in Children's Homes (1 192 or 27.2 per cent). Of these, 632 were males, and 44.1 per cent was in the South East region. The second largest category of children was those who were in Foster Care (19.5 per cent), followed by those who were home on Supervision Order (19.0 per cent), then by children who were reintegrated with their families

(Family Integration) {18.1 per cent}. As such, the majority of children in state care (56.6 per cent) is living in a family environment. This is in keeping with the government's focus towards keeping children in family environments as against state institutions. There were 281 children (150 females) in Places of Safety, representing a 15.4 per cent reduction in the numbers compared with the previous year. Some 42.0 per cent of these children were in the South East Region. Of the total number of children in care, approximately 22.2 per cent were residing in government facilities (Table 25.3B). The number of children in the facilities more than doubled compared with 2013. There were 1 591 children residing in private Children's Homes and Places of Safety.

The Children and Family Support Unit (CFSU) of the CDA provided psychosocial support to some 1 177 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 eight were brought before the courts. The work of the Unit has resulted in a net savings to the GOJ of over \$8.0 million per month as the intervention prevented the need for those children to be brought into the tertiary child protection system, that is, children placed in state care on a Fit Person Order. The interventions carried out resulted in 99.0 per cent of the children served being maintained in their families. The psychosocial support provided by the programme was introduced in the southern region in March.

The CDA made 2 028 visits to police stations and jails islandwide, to monitor the detention of persons under 18 years of age and provide interventions. The Agency also continued to monitor Residential Child Care Facilities (RCCF). The CDA's Facility Monitoring Team comprising six individuals made 524 announced and unannounced visits, achieving 85.0 per cent of the target. The largest proportion of visits (38.4 per cent) was to facilities in the South East Region.

During the year, priority was given to strengthening the CDA's presence in the Multi-Agency Strategic Development for Child Protection partnership within the Southern and Western regions. Since the initiation of the pilot programme

**TABLE 25.3B
POPULATION OF CHILDREN IN
GOVERNMENT INSTITUTIONS FOR
QUARTER ENDING DECEMBER 31, 2014**

INSTITUTION	Total
The Father's House	31
Muirton Boys' Home	81
Manning Boys' Home	165
Granville Place of Safety	170
Homestead Place of Safety	168
Glenhope Child Care Facility	142
Blossom Gardens Child Care Facility	124
St. Augustine Child Care Facility	91
TOTAL	972

Source: Child Development Agency

in these regions, two social workers were engaged and deployed and over 426 children have been served, mainly in the parishes of Clarendon, Manchester and St. James. Over 98.0 per cent of children were maintained in a familial setting while interventions continued. Funding for the programme was secured through UNICEF for one year, ending in March 2015. The programme forms part of the CDA's overall response mechanism which seeks to reduce incidents of re-traumatizing victims and diverting children from the justice system for care and protection matters. The Agency's Rapid Response and Assessment Team was operationalized during the period and forms part of the CDA's intervention capacity through the strengthening of its investigative framework, diversionary activities, and leveraging stakeholders' capabilities and resources. Since its inception, the team has responded to over 15 situations islandwide and provided intervention for children and families affected by incidents of trauma.

The initiative designed to strengthen and expand the Child Protection Committee (CPC) network across the island gained momentum during the period with a series of development seminars for the three existing committees in St. James, St. Catherine and Clarendon. Approximately 105 individuals benefited from the training. The major areas of focus were strengthening the organizational structures of the CPC, child rights and provisions of the child protection system in Jamaica, role of key agencies, and mandatory reporting among others. The development seminars were also used as a medium through which the CPCs examined the findings coming out of the dipstick surveys conducted in 2013 and began formulating preventative plans of action. At least two public fora impacting 650 individuals were conducted in Clarendon. Efforts towards the establishment of new CPCs began, with dipstick surveys being conducted in Hanover, Westmoreland and St. Ann. The results of the survey were documented and discussed. The CCDC also secured funding for another round of training of members of the JCF in child rights.

In an effort to strengthen the Independent Transitional Living Programme for children in state care, the CDA has initiated discussions with the National Housing Trust (NHT) to develop a programme to establish living spaces for 40 males on premises in Southfield, St. Elizabeth and for 12–20 females on premises in Granville, Trelawny. The USAID—through the CCDC—committed funding (US\$1.4 million) to support the standardization of the Transitional Living Programme within the child protection sector. The programme, to be implemented over the period 2014–2017, seeks to provide services to improve preparation for transition to independent living for children leaving residential care. The USAID support will see the development of an exit-readiness programme of life skills, job skills training and mentorship, and the construction of a safe and suitable transitional living facility for 40 girls. The project was launched in November and will be implemented

over a four-year period, in partnership with the CDA.

The CDA—through its public education and community mobilization activities—impacted over 510 870 individuals through television and radio campaigns, participating in over 200 meetings/public fora, parenting sessions, PTAs, public relations activities, and preparing various articles and public service submissions to major newspaper outlets. There were also some 72 000 pieces of literature prepared and distributed during the year. Over 70 requests for information were granted through the Agency's Resource Centre. Other interventions by the Agency included familial support by helping parents meet their basic needs and educating them about parenting skills and children's developmental stages, associated behaviours, discipline and safety. Over 772 parents, including 50 teenage mothers, were impacted by these sessions. The Agency also hosted three community fora dubbed "Circle of Love". The events were held under the theme "Protecting Children, Transforming Lives, Securing the Future" and sought to highlight issues affecting children while engaging the family and community in enhancing effective child care and protection practices. Over 500 individuals participated.

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 615 reports were made to the OCA during the year, with 137 of these cases being closed at year end. Of the total, 263 were made directly to the OCA and were recorded in its Journal of Complaints, while 352 were referred by the OCR. Girls continued to be disproportionately impacted by incidents of sexual abuse (83.6 per cent of a total of 134 reported cases), while boys were highly represented in cases of physical abuse (63.3 per cent of a total of 226 reported cases). Cases of neglect were relatively equal among the sexes (72 males and 70 females). There were no cases of child trafficking and only two cases of child labour received by the OCA in 2014. Kingston and St. Andrew (193), St. Catherine (109), and Manchester (61) featured frequently in the number of reported cases, while Hanover (7) and Portland (8) reported the least cases of abuse to the OCA. July (103) and September (94) also stood out with the most reports being made in these months compared with other months. May (27) and August (28) had the least number of reported cases of abuse made to the OCA. The majority of reports (73.8 per cent) made to the OCA was regarding children 10 years old and over. Some 39 reports of abuse were concerning children below five years old. Of the total number of reports, 410 were complaints against relevant authorities, while 64 were clients seeking legal representation. The majority of complaints made against relevant authorities was against Child Care Facilities. Complaints were also made to the OCA regarding assistance with acquiring birth certificates, administration of estate, and care and protection generally.

The OCA's Emergency Response Focal Point Unit⁸ dealt with three such cases in 2014 bringing the total to five since the unit's establishment. The nature of the cases was physical abuse, murder and suspected food poisoning. The unit provided investigative, psychosocial, counselling, and liaison support in these matters.

Other initiatives by the OCA to advocate and protect the rights of children in keeping with its mandate included the launch of the M.A.R.C.H. (Military Assisting the Rights of Children) Project in May. The project is a collaborative effort of the OCA and the Second Battalion The Jamaica Regiment (2JR). This collaboration led to the successful undertaking of the inaugural OCA/2JR5K–10K Run for Charity and an official visit and intervention session with the wards of the Metcalfe Juvenile Secure Remand Facility. The visit to the remand facility for boys on November 18 included presentations to 59 boys, motivational talks, testimonials and storytelling. In April the OCA also launched its inaugural uAnimate Poster Competition in which students in various age-groups were invited to submit entries on the themes "How violence in my home or community makes me feel", "How can I help to report child abuse", and "How can I say no to peer pressure and inappropriate sexual influences". A total of 116 entries were received, with three grand prize winners and certificates being issued to other noteworthy pieces in May at the inaugural uAnimate Awards Ceremony. In November the OCA also celebrated the Universal Children's Day in partnership with Ntukuma Jamaica, as the day coincided with National Storytelling Day.

In keeping with its establishment of Child Justice Guidelines launched in 2013, the OCA continued to train Justices of the Peace, police and other stakeholders on its content and use. A total of 148 key stakeholders were trained in Kingston, St. Andrew, St. Catherine, Clarendon, St. Ann and St. Mary.

In addressing the issue of **child labour**, the Child Labour Unit within the MLSS continued to lead the policy and programme interventions. To inform the work of the Child Protection Committees, a number of dipstick surveys were conducted in several urban centres across the island. This included May Pen, Clarendon; Savanna-La-Mar, Westmoreland; and Lucea, Hanover. Draft Regulations were established in anticipation of the early promulgation of the new Occupational Safety and Health Act. The Regulations will provide Labour Administrators with greater powers to apprehend persons found acting in contravention of the law (see chapter on Labour Market). The draft Regulations were the subject of consultations among major stakeholders. The regulation will include the list of hazardous occupations

for exemption. Child Protection Committees were piloted in Kingston and St. Andrew, Clarendon, St. Catherine, and St. James. These parishes reflected the highest incidences of vulnerability among children and families interviewed for the dipstick surveys. Public awareness and sensitization on child labour was promoted during the observation of World Day against Child Labour. The theme for the year was "Child Labour and Social Protection". During the year, Jamaica became an active member of "The Latin America and the Caribbean Free of Child Labour Regional Initiative", an initiative of the International Labour Organization (ILO) to ensure the implementation of measures for the elimination of child labour in the region by 2016 in keeping with the ILO's global target.

The **Possibility Programme**, through the Ministry of Youth and Culture, continued to provide support for boys and young men 10–18 years who are at risk, including those on the street. The programme widened its reach to include children who are at risk of working on the streets or have other needs. The basis for the expanded focus was: a decline in the number of boys on the street below age 18 years; request from vulnerable boys; and the programme receiving approval in 2013 to operate as a Residential Childcare Facility (RCCF). The programme 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. A total of 58 boys were served by the programme: 28 through the care centre; 13 through the skills centre; 7 through the JDF partnership; and 10 at the hostel. The total number of boys served by the programme represents a 41.5 per cent increase compared with the previous year. Of the seven JDF trainees, five were awarded certificates of participation, four were employed and the duration of training was extended by six months to facilitate application for entrance into the army. The interventions provided by the programme received support from a number of government and non-government organizations.

Child and Adolescent Mental Health Services (CAMHS) continued to be provided, with increased 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. South East Regional Health Authority (SERHA) accounted for the majority of client visits at 4 764 (60.1 per cent male). There were 1 527 client visits (56.1 per cent male) to the North East Regional Health Authority (NERHA) and 1 373 (56.4 per cent male) to the Southern Regional Health Authority (SRHA)⁹. The SERHA and SRHA exceeded the number of projected visits for 2014, with

8. The OCA's Emergency Response Focal Point Unit was launched in September 2013 as a response to matters of abuse not directly reported to the OCA but come to the office's attention through the media or other sources. The cases are usually deemed as urgent.

9. The number of client visits for the Western Regional Health Authority was not available.

projected visits being 4 000 and 960 respectively. The child and adolescent mental health services throughout the regions continue to have far reaching impact not only through client contact with children and their families but also through close collaboration with other agencies that interface with children. This impact occurs through health education and promotion activities as well as training and sensitization. A new clinic site was established in Yallahs, St. Thomas and one in Linstead, St. Catherine was re-established.

The MOH's Mental Health Unit also partnered with UNICEF to conduct a study on suicidal behaviour. A part of the study, which was included in a 2013 National School Survey carried out by the National Council on Drug Abuse, revealed that approximately 20.0 per cent of a sample of children from Grades 8 to 12 was at risk for suicidal behaviour. A task force was subsequently formed to recommend measures to address this situation. These measures will include the development of teaching materials and protocols for dealing with suicidal behaviour for students, school personnel and health personnel as well as training. A manual, *Common Mental Disorders in Children and Adolescents: Guidelines for Diagnosis and Management* was developed.

Under the Reducing the Juvenile Population in State-supported Institutions (RJPSI) Project, mobile mental health services (Smiles Mobile) continued to be provided, including psychological assessment and treatment of children in the South East Region. A total of 412 wards of the state (208 boys) in 11 residential child-care facilities and two juvenile correctional centres were screened to determine their mental health status. Of this number, assessments were completed for 105 children whose status suggested the need for further diagnosis, while 55 wards received treatment. Work towards mainstreaming the Smiles Mobile into the operations of the CDA also commenced (see chapter on Health).

Background research was carried out on the operations and service provisions of therapeutic centres guided by 'best interest' practices in a number of jurisdictions. This was done in an effort to create a framework to guide the establishment and operationalization of a medium controlled therapeutic centre in Jamaica. A profile of the therapeutic centre was subsequently developed and an oversight committee established. A decision was taken to utilize a part of the property that now houses the Maxfield Park Children's Home to establish the centre and efforts commenced regarding a design for the centre as well as fundraising to support its development. The CDA hosted a "Fit for Children" 5K Run/Walk and Push Kart Derby as part of its 10th anniversary celebrations. The event brought awareness and helped to raise funds towards the construction of the medium controlled therapeutic centre.

A special mental health intervention was conducted at

the South Camp Juvenile Remand and Correctional Centre in which a model therapeutic intervention for juvenile correctional centres was implemented. The intervention resulted in the reduction of the high incidence of self-harm and suicide attempts over a six-month period, from 25.0 per cent to 5.0 per cent at the facility, representing an 80.0 per cent reduction in these incidents. The intervention, which combined a variety of therapeutic approaches, recommended new approaches to rehabilitation to be used by correctional officers, social workers, psychologists and psychiatrists in the juvenile correctional services. The intervention was implemented by the MOH and funded by UNICEF. This programme ran from March to October and was a preparatory initiative for a rehabilitative programme entitled "Promoting a Healthy Environment and Productive Alternatives for Juvenile Remandees and Offenders in Jamaica", funded by the United States Agency for International Development (USAID) through the Organization of American States (OAS).

YOUTH (15–24 YEARS)

The population estimates for 2014 indicate that youth comprised 19.5 per cent of the total population. The average youth labour force totalled 195 350 while the average annual youth unemployment declined to 34.2 per cent (see chapter on Labour Market). Youth development through targeted programming by government and civil society continued throughout the year. This section examines the policies, programmes and activities which affect the youth cohort of the population.

Policy and Programmes

Activities under the Inter-American Development Bank (IDB) funded **Youth Development Programme** progressed with the advancement of the revision of the National Youth Policy and increased programming through the Ministry of Youth and Culture (MYC) and its agencies. The programme also supported the construction of the Youth Information Centres (YICs), with centres being active in St. Catherine (Portmore), Portland, St. Mary, St. Elizabeth, Manchester, St. Ann, St. James, Westmoreland and Clarendon. The MYC reported that approximately 171 000 youth were served by the YICs over the 2014 period, with 8.3 per cent being unattached and 80.0 per cent being male users. Construction of the Hanover and Spanish Town centres commenced in 2014.

Approximately 30 Correctional Officers, Youth Empowerment Officers and youth workers benefited from training under the United Nations Children's Fund (UNICEF) supported **Innovative Sports and Arts for Youth Improvement (ISAYI) Programme**. The programme aimed to provide life skills; promote behaviour modification; facilitate creative arts and sports training; and decrease the recidivism rate by providing intervention for 200 youth offenders.

The MYC continued with the implementation of numerous other programmes toward youth development. The **Jamaica Youth Ambassadors Programme** was reactivated in 2014. Twelve candidates were shortlisted, six of whom would be selected as ambassadors and will be officially installed in April 2015. The programme is geared toward increasing and improving youth advocacy and leadership through international relations with two ambassadors each to be assigned to the Caribbean Community (CARICOM), the United Nations General Assembly and the Commonwealth. Like the Youth Ambassadors Programme, the **Jamaica Union of Tertiary Students** was also focused on advocacy, leadership and governance.

The **National Secondary Students Council** remained active in identifying, supporting and advancing the interests of secondary school students while promoting student governance, youth leadership and participation in the decision-making process of civil society. The programme also sought to develop a greater interest in civic, economic, commercial, industrial and cultural affairs in students. The Council installed a new Executive in November with 109 schools participating in the elections, an increase of 24.0 per cent compared with the previous year.

The **National Youth Council of Jamaica** also contributed to youth development by strengthening and organizing youth networks while improving the sustainability of youth organizations; promoting social cohesiveness, volunteerism, national consciousness and patriotism among youth; fostering youth leadership at the community level; strengthening the parish youth councils; assisting in the formulation, implementation and evaluation of government policy regarding youth; and advocating for youth participation at all levels of governance. In achieving their mandate, over 340 community-based youth organizations were audited and 221 community-based youth organization leaders were trained under the Rights Awareness Programme, in collaboration with the British Council and RISE Life Management and over 500 participated in the National Youth Organization Sports Challenge.

The **Ministry of Science, Technology, Mining and Energy (MSTEM)** in their effort to engage youth in the digital and animation sectors, commenced work on the World Bank supported, *Youth Employment in the Digital and Animation Industries Project*. The main objective of the project is to support youth employment in the digital and animation industries. Activities under the project include building the capacity and enhancing the skills of youth to improve their employability in the growing animation industry; establishing a Start-up Jamaica Hub to host the Acceleration Programme and other training initiatives for start-up companies in partnership with private sector companies; increasing the amount of private sector investments in youth start-up companies; and strengthening the country's capacity in science, technology and innovation. The MSTEM carried out activities mainly associated with the establishment and operation of the Project

Implementation Unit which will oversee the implementation of the project, and the establishment of Start-Up Jamaica. It is expected that the project will get off the ground more fully in 2015.

Non-Formal Training

The **National Youth Service (NYS)** continued its mission of developing a strong youth citizenry by engaging 14 082 youth, which was more than double the amount engaged in 2013. 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 **Financial Assistance Programme** was one such initiative of the NYS which provided grant assistance to post-service participants who are pursuing tertiary education. Throughout the year, 487 students received up to 20.0 per cent of the tuition payment. Of this amount, 362 were female beneficiaries. The NYS and Northern Caribbean University expanded their partnership in the **Access to Higher Education Partnership Programme (AHEPP)** by collaborating with the Caribbean Maritime Institute, College of Agriculture Science and Education, and the Brown's Town Community College. The programme provided tuition assistance to 92 students (56 females) to pursue tertiary studies in national priority areas.

The NYS continued to expose youth to employability skills by providing 4 772 participants of the **National Summer Programme** with voluntary work experience. To build on the theme of work experience and skills development, the NYS also implemented the **Events Production Assistants Programme** in conjunction with the Jamaica Cultural Development Commission (JCDC) {see section on Culture}. The programme was designed to introduce 50 youth participants to event planning and implementation through training and work experience. A total of 1 563 youth were engaged in **Entrepreneurship 101 Sessions**, with the goal of developing young entrepreneurs by stimulating their interest in entrepreneurship. In addition to this, 115 youth (78 females) participated in the **Entrepreneurship Programme** and received business development training and support. The programme provided youth with the tools and skills needed to assist them in starting a business. The programme included competitions in five parishes with the winners competing at the national level for awards and prizes totalling \$650 000.00.

The **Graduate Work Experience Programme** engaged 566 participants (373 females) by providing tertiary graduates with a first degree or an associate degree, with the chance to enhance their personal and professional development via workshops and work experience.

In an effort to increase youth participation, the NYS embarked on a series of youth fora to encourage youth to express their views on varied subjects and issues affecting that population. The **Xpress Yuhself** youth fora also allowed youth to express their opinions on the many programmes targeting them and to identify programmatic gaps to assist decision

makers in the development of policies and programmes. The consultations had 5 120 attendees including students, youth from vulnerable communities, youth with disabilities, Rastafarian and Maroon youth, rural youth and youth from a wide range of youth organizations.

Youth Support

Male youth continued to receive support from the **Kingston YMCA** through the **Youth Development Programme** which catered to 131 males aged 12–15 who were school dropouts and at-risk. The 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 YMCA continued its partnership with the Jamaica Co-operative Credit Union League for the barbering programme during July and August. The programme was extended to include older boys through afternoon sessions and offered remedial classes and provided barbering kits.

Extra-curricular and recreational activities also formed a part of the Youth Development Programme offered by the YMCA and these included aquatics, badminton, taekwondo, football, leadership training, and counselling. Programmes catering to adults with disabilities were also included in the YMCA's programme roster through the **Special Needs Programme** which delivers hands-on practical experiences, life-coping skills, remedial classes, art and craft, and computer training. As part of its mandate, the affairs of the Boys' Town Schools and Training Centre continued to be managed by the Kingston YMCA.

The Youth Development Programme celebrated another accomplishment, with 30 students being successful in the Grade Nine Achievement Test and gaining placement at various technical high schools. Two students were also successful in the CAPE and CSEC exams, respectively. Motivational sessions by members of the Rotary Club of Kingston and Brotherhood of Bethel Baptist Church continued throughout the year. To achieve the objectives of the **Aquatics Programme** to encourage the development of a healthy lifestyle through swimming, the pools were extensively renovated and reopened and approximately 2 000 persons were taught how to swim. The YMCA organized a swimming competition in conjunction with Burger King. Over 700 children from 38 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. In an effort to enhance the sport of badminton in Jamaica and establish a membership base for youth, the YMCA continued to allow various schools and clubs to utilize its facilities.

During the year, over 180 youth were engaged in the **Leadership Training Programme** for a period of ten weeks, after which they were interviewed and assigned to the summer camp as counsellors. The programme targets youth aged 14 to 26 and provides an opportunity for productive engagement throughout the summer period. The Summer Camp programme was sponsored by the Petroleum Corporation of Jamaica, Grace Kennedy, and Bethel Youth Summer Employment Programme along with the YMCA.

The YMCA also implemented the **Reproductive Health and Family Life Education Programme** through the Youth Friendly Centre, which continued to focus on:

- increasing the cadre of trained adult and adolescent counsellors
- increasing the capacity of counsellors and programme staff to identify and respond to reproductive health needs of adolescents
- strengthening the communication between the YMCA and a select group of youth friendly health facilities in the Kingston and St. Andrew area
- strengthening the referral systems between the YMCA and clinical care providers
- increasing knowledge and self-efficiency of students on reproductive health and promoting safer sex practices among adolescents
- positively influencing help seeking behaviour and practice of students aged 12–19 years and increasing the independent use (self-referral to) of counselling and clinical service
- increasing positive communication between adolescent boys and their parents.

Despite the reported successes throughout the year, the administrators of the YMCA encountered many problems and took steps to address them. These problems include high illiteracy levels, hostility among youth, low self-esteem issues, lack of parental care, high incidence of exposure to violence, and poor nutrition.

The **Jamaica 4-H Clubs**¹⁰, which function largely as the youth arm of the Ministry of Agriculture and Fisheries, objective is to attract educated and technologically aware youth into farming supported through its various programmes. The provision of training in the areas of agriculture, leadership and social skills, home economics, environmental awareness and healthy lifestyle continued in the year. The Jamaica 4-H Clubs reported that 78 113 persons were registered across

10. The Jamaica 4-H Clubs target persons aged 5 years and over.

1 068 clubs islandwide during the year. Of this amount, approximately 43 686 were female youth. The 4-H Clubs also reported that it provided 143 965 training opportunities over the same period. Under its empowerment programme, the Jamaica 4-H Clubs trained 659 persons with funding from the Sugar Transformation Programme, and 107 students were awarded scholarships and bursaries under the Rio Tinto Alcan Legacy Fund. The Club also trained 236 participants in the tractor operation & maintenance programme, 102 persons were trained in the commercial meal preparation programme while 243 participants were trained in housekeeping, 93 in apiculture, and 31 in small engine repairs. The Jamaica 4-H Clubs also continued to offer programmes such as the National School Garden Programme, Broiler Chicken Distribution Programme, Goat Revolving Programme, Rabbit Revolving Programme and the Agricultural Entrepreneurship Programme.

In an effort to encourage youth to become involved in agriculture and the Agro Parks project, the 4-H Clubs facilitated the distribution of 100 acres of land in the Spring Plain Agro Park in Clarendon to 20 youth. Upon completion of infrastructure development, five-acre plots will be distributed. During the period, the club undertook the construction of four greenhouses in four schools. The greenhouses aided in the development of training as well as the commercial provision of vegetables and seedlings. The 4-H Clubs also carried on the production and processing of peanut at the Warminster 4-H Centre in St. Elizabeth where over 400 000 sachets were produced.

SENIOR CITIZENS (60 years and over)

Some 11.9 per cent of the population (324 100 persons, 169 000 females) are Senior Citizens (see chapter on Population). The National Council for Senior Citizens (NCSC), a department of the Ministry of Labour and Social Security (MLSS), continued its collaboration with government, non-government, and international partners to offer services and support to senior citizens in fulfilment of their mandate, objectives of the National Policy for Senior Citizens, and other international agreements on ageing.

The NCSC continued to implement its programmes islandwide through its 529 senior citizens clubs, of which 72 were inactive. Reduction in the number of clubs over the years has been due to a number of reasons including reduction in membership due to death and members not having sufficient financial resources for transportation to meetings. A lack of leadership at the club level was also noted. Notwithstanding the decline in clubs, 135 new members were added during the year. The total membership of the clubs was 23 871, with the majority (17 934) being female. The active membership stood at 20 436 (77.5 per cent female), and 3 435 members were shut-ins (60.8 per cent female). As in 2013, St. James had the largest number of active clubs (90), followed by St. Catherine (77), then St. Andrew (57). All three parishes saw declines in the number of active clubs and overall membership

compared with 2013. Some 3 634 volunteers (77.0 per cent female) assisted with the activities of the clubs. The NCSC continued to partner with faith-based organizations, the private sector, and non-governmental organizations to implement their activities.

Educational interventions and cultural activities geared towards mental stimulation of seniors and the inter-generational transfer of knowledge and culture were held. These included the annual parish level and national Bible Quiz, Spelling Bee competitions, and 11 Cultural Day activities held at the parish level. The Cultural Day activities saw the participation of 697 persons. An inaugural national Cultural Festival was also staged under the theme “Brillanté: the Older the Moon the Brighter it Shines”. Fourteen culinary, art and craft exhibitions were held at the parish libraries, and the Jamaica Information Service (JIS) and other media houses displayed the work of senior citizens. Some 698 seminars, workshops and fora were held with 2 343 participants. The NCSC in collaboration with parish libraries facilitated the training of 195 seniors and volunteers in computer literacy. Some 1 670 seniors and volunteers also participated in educational and recreational tours to places of interest locally and overseas including amusement parks, beaches, and botanical gardens.

A total of 127 health-related activities were held across the island with 4 687 participants. These included seminars, small group discussions, and fairs in collaboration with other ministries, and private organizations, service clubs and community groups. The World Health Day, Men’s Day, Cancer Awareness Day, among others, were observed. The areas covered include: vector borne diseases, the most common forms of cancer, dental and foot care, Pap smear testing, joint care, sexuality and older persons, diabetes, high blood pressure and blood sugar testing, dementia, meal preparation, keeping healthy, eye screening, and HIV/AIDS. Fourteen parish sports days were held along with three regional sports and fun days to help promote active ageing among seniors. They participated in both track and field events. Seniors also participated in other recreational and mentally stimulating games including dominoes, hula hoop, and cards. A total of 1 146 persons (895 females) attended the three regional sporting events.

In keeping with the concept of productive ageing and ensuring full participation of senior citizens in income generating activities, 304 income generating activities were reported islandwide. They included handicraft, preserves, pastries, confectionery, and farming of cash crops with emphasis on backyard gardening, horticulture, poultry rearing, straw craft, needlecraft, and sale of dry goods and beverages. A total of 657 skills training workshops were held involving 4 248 participants. The best items that were made at the various workshops were submitted for judging at the annual Culinary, Art and Craft Competition, which was held from June to July, where 8 325 items were presented for judging. Seniors and volunteers were also encouraged to market their

TABLE 25.4
NATIONAL COUNCIL FOR SENIOR CITIZENS
REFERRALS, 2014

PROGRAMME	NO. OF REFERRALS MADE
NIS	1 030
Poor Relief	-
JADEP	1 028
NHF	1 380
Public Assistance	300
Bus Pass (ID)	-
PATH	845
Food For the Poor	-
Ministry of Health - Clinics/Hospitals	276
Other Agencies	734
TOTAL	5 593

Source: National Council for Senior Citizens

products in an effort to supplement their pension and income. Six retirement seminars targeting workers who had 5–10 years in the formal working environment, were held on preparing for retirement in collaboration with other Ministries, Departments and Agencies (MDAs). Presentations were made on financial planning, the ageing process and psychosocial challenges and stages of retirement. An additional 14 retirement planning seminars, targeting persons of working age 18–59 years old, were also held under the theme “Retirement is a Process not an Event – Be Prepared”. Some 561 persons (482 females) participated from the community and youth groups.

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 113 525 cooked meals and 4 582 food packages were provided to beneficiaries of the Meals on Wheels programme, and seniors who attended the secretariat’s Day Activity Centre and club monthly resource meetings. Senior citizens organizations in the rural parishes provided an average of 2 706 meals per quarter to shut-ins and persons attending the Day Activity Centres. They also provided 361 food packages during public holidays. Another service initiative, the Home Help Programme, accounted for 1 289 visits to the homes of senior citizens by three nurse aides, parish organizers and volunteers.

The NCSC continued to issue identification (ID) cards islandwide free of cost to all senior citizens. The ID cards are used to access Smarter Cards for concessionary fare on the Jamaica Urban Transportation Company (JUTC) buses in the Kingston Metropolitan Region and the Metro Bus Company in St. James (Montego Bay), which also offers services to Trelawny (Falmouth) and Hanover (Sandy Bay). The identification cards are now accepted by the Passport and Immigration and Citizens Agency (PICA), banks and other organizations that offer special benefits to senior citizens. During the period, 2 320 cards were issued, 863 more than the previous year.

The NCSC made 5 593 referrals compared with 7 312 in 2013. The majority of referrals was made to the National Health Fund (NHF), the National Insurance Scheme (NIS) and the Jamaica Drug for the Elderly Programme (Table 25.4).

Senior citizens continued to build and sustain 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. As in 2013, community projects included beautification of green areas, collection of plastic bottles, feeding of street people, repairing of homes, and donation of houses to the less fortunate. Senior citizens 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 through its secretariat and parish organizers assisted 99 students from universities, high schools and other academic institutions with their practicum and community service exercises. Seniors also participated in national functions, and were recognized at national awards ceremonies including those held to commemorate Heritage Week, Independence, and Emancipation Day.

Senior Citizen’s Week was observed across the island during the period September 28 to October 4, which include National Grandparents Day and International Day of Older Persons; under the theme “Active Ageing through a Healthy Lifestyle”. Activities included church services, tree planting exercises as a means of giving to the future (intergenerational activity), physical activities, and HIV/AIDS sensitization workshops to promote the theme in collaboration with the Ministry of Health, National Family Planning Board and private sector entities. Parish award functions were held in recognition of sponsors, seniors and volunteers, who have participated in the social, cultural, spiritual, educational, culinary, art and craft skill activities. Recognition was also given to seniors who have contributed positively to their community in health, education, religion, agriculture and community services. Seniors also went on recreational trips and visits made to shut-ins including centenarians. Media coverage was provided for some of the major activities.

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. A notable achievement during the year was the presentation and passing of the Disabilities Act in October. Work towards facilitating and prioritizing the implementation of the Act also commenced with the establishment of a working group by the Ministry of Labour and Social Security to include the restructuring of the Jamaica Council for Persons with Disabilities (JCPD), an agency of the MLSS with primary responsibility for policy and coordination of programme implementation for persons with disabilities. Efforts were also made toward the preparation of the Codes of Practice and Regulations for the Disabilities Act

and the establishment of a Disabilities Rights Tribunal. Since the passing of the Act, consultations were held islandwide by regions during November and December. The consultations provided critical information from key stakeholder groups including persons with disabilities to guide the preparation of the Codes of Practice and Regulation for the Disabilities Act. Information was also gathered from a number of ministries during December to determine the extent of their implementation of any policy for persons with disabilities and their level of compliance with the Act.

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 also supported the government in advocacy and service provision for persons with disabilities. The JCPD continued its public education and outreach on disability through symposia, seminars and meetings. Public education sessions were conducted in nine parishes. Promotional activities included health and wellness fairs, career development expositions, and exhibitions of craft items made by persons with disabilities in various parishes. Outreach activities were conducted in December, with the distribution of 775 food packages to 300 males and 475 females in the parishes of Kingston, St. Andrew, Trelawny, Hanover, St. James, Clarendon, Manchester, St. Mary, St. Elizabeth, and St. Catherine. The JCPD collaborated with a number of international development partners and other stakeholders to promote the rights of persons with disabilities in the areas of enabling environment and human rights, advocacy and inclusion, disaster risk reduction, post-2015 development agenda, and information technology. Disability Awareness Week in December was commemorated under the theme “Opening Doors: Creating Access for an Inclusive Jamaica”. Activities included a national church service, consultations in Kingston and St. Andrew, and Manchester.

During the year, 30 000 persons with disabilities were registered and re-registered with the JCPD. The JCPD provided Rehabilitation Grants to registered persons with disabilities to support areas such as the procurement of Assistive Aides, Farming, School and Medical Expenses, and Small Business Development. A total of \$7.9 million in Rehabilitation Grants was disbursed to 317 clients (173 males) over the year. This represents an increase of \$5.0 million compared with the previous year. However, there was a reduction of 271 persons benefiting from these grants. Some 148 grants were provided for school related expenses (school/administrative fees, boarding fees, examination fees and school books, uniform, supplies, and transportation) totalling \$2.2 million. Other rehabilitation grants included: 28 for Assistive Devices totalling \$0.4 million; 52 for Medical Expenses totalling \$0.6 million; and 23 for Small Businesses at a total of \$0.4 million. Some 23 persons also received assistance in the form of a shadow (support person) at a total cost of \$2.3 million. An additional 21 persons received assistance through the Assistive Aide grant totalling \$1.8 million; and 91 persons received assistance through the Economic Empowerment

Grant (EEG) totalling \$7.1 million. Scholarships were awarded to 12 students at a total of \$1.1 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 30 000 persons were registered with the JCPD up to December. The project also funded capacity building and training of practitioners and parents involved in early stimulation of children with disabilities. Training of parents and staff development training of the Early Stimulation Plus and the JCPD were completed. A Knowledge, Attitude, Behaviour and Practice (KABP) survey of the society’s view of persons with disabilities also commenced.

The Early Stimulation Programme (ESP) of the MLSS continued to provide services for young children with developmental disabilities and their families. The services include: professional identification and developmental assessment of pre-school children; formulation and implementation of specific individual programme plans; physiotherapy; home-based and community-based intervention programmes; early childhood education; parent counselling (group and individual); parenting workshops; basic early childhood training, inter alia. As at December there were 1 532 clients served by the programme. The ESP conducted a total of 143 new clinic sessions in which 762 new clients were assessed and diagnosed from Kingston and other parishes. Through the re-evaluation clinic sessions some 632 clients were reviewed and re-evaluated. The physiotherapy unit treated 1 415 clients. There were 41 adaptive aids made and distributed to clients while 31 children received orthopaedic management services. Some 239 parents attended counselling sessions. The ESP referred 146 children for school placement in special education primary school and mainstream primary schools. Of those children, 80 were placed in the special education schools and 37 in the mainstream primary schools. At year end, the ESP’s Child Development Centre had a total of 126 students on register, ages 3–6 years.

Through its community-based intervention, ESP held management and intervention sessions with 2 124 persons, of which 436 were from St. Catherine and 575 from Portland and its environs.

The **NGO community** continued to support the efforts of the government through the provision of services to persons with disabilities including children and youth. The areas of service provision include skills training and community-based rehabilitation. A total of 313 persons (182 males) 0–18 years in St. Catherine, Manchester, St. Elizabeth and St. James were served by Community-Based Rehabilitation Jamaica (CBRJ) during the year. This represents a reduction of 83 clients served compared with 2013. The largest proportion (42.5 per cent) of clients served was from St. Catherine. The CBRJ continues to receive financial and other support from

the GOJ and the private sector towards implementation of its programmes and towards its operation. However, the reach of its services continue to be challenged by lack of resources. Of those receiving intervention, 91.4 per cent was children 0–15 years old. The largest proportion of the clients (86.9 per cent), particularly those with severe or multiple disabilities, received home-based interventions. The remainder was 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. The CRBJ also collaborated with the JCPD in registering persons with disabilities in the parishes in which they operate.

The Abilities Foundation, a voluntary organization supported by the MLSS, continued to provide skills training and certification for its target clientele over the year. Some 80 persons received training, with the majority (47) being male. Males dominated all the skill areas (Data Operations, Furniture Making, Design and Décor, Ornamental Horticulture and Landscaping) except Housekeeping, which was 95.0 per cent female. 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. The Foundation received budgetary support through a \$6.4 million grant from the Social and Economic Inclusion Project for persons with disabilities managed by the MLSS. This grant was used to support: upgrading of learning facilities; provision of stipend payments to students; building of capacity in the form of professional development seminars and staff training; revamping the marketing of materials; job placement of students; promotion of public relations image of the Foundation; and the improvement of salaries for the instructors.

During the year, the Abilities Foundation received support from private sector entities and multilateral funding agencies, to the tune of \$11.0 million. Of note, were separate partnerships with the Digicel Foundation and the National Commercial Bank to improve the physical plant; forge new ventures to generate income for the institution; provide training and employment for graduates; and award scholarships.

In June 2013, 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. Achievements in 2014 included:

- Completion of Study – Needs Assessment of persons with disabilities on PATH and Capacity Assessment of NGOs providing training to persons with disabilities.
- Signing of eight consultant contracts with NGOs to provide skills training and certification for persons with

disabilities on PATH. Activities under these contracts also included capacity strengthening of organizations. A total of 172 persons with disabilities were engaged in training, apprenticeship and employment activities. Organizations implementing activities included Jamaica Association for the Deaf, Development Options, Abilities Foundation, Jamaican Association on Intellectual Disabilities (three contracts in St. Ann, Manchester and Kingston), UWI Centre for Disability Studies, and Portmore Self Help Disability Organization.

- Staff Development and Planning Workshops held with staff of the ESP that facilitated the completion of a Work Plan of activities for 2015–2016.
- Commencement of Needs Assessment and Institutional Review of the Early Stimulation Programme.
- Creation of database of persons with disabilities receiving interventions under the project.

GENDER

The implementation of measures to strengthen gender-based planning and policy formulation, and a focus on reducing discriminatory practices that limit gender equality remained the commitment of the government over the year. Social development in the area of gender mainstreaming was addressed through work on legislation, research studies and collaboration on various projects and programmes.

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 BWA through its programme of work continued to promote various measures and interventions to advance the consideration of gender perspectives in policy and programme development. The strategies were aligned to the Bureau’s programme objectives to affirm that gender equality and women’s empowerment are central to the achievement of Goal two of Vision 2030 Jamaica – National Development Plan, as well as the goals of the numerous national, regional and international agreements to which the country is a signatory.

Gender equality and mainstreaming

The activities implemented by the BWA were designed to facilitate gender mainstreaming as one of the key priority areas of focus in keeping with the goals and core principles outlined in the National Policy for Gender Equality (NPGE) and the National Strategic Action Plan to Eliminate Gender-based Violence (NSAP-GBV). Significant work was advanced in the form of legal Briefs and written submissions in support of the Disabilities Act 2014; the Child Care & Protection Act 2004; the Domestic Violence Act 2004; the Offences Against the Person Act 2010; and the Sexual Offences Act 2010, to facilitate the process of legislative review to provide greater

protection and redress to the Jamaican citizenry, particularly the most vulnerable and underserved.

The BWA conducted sensitization sessions among staff in the public sector to support the implementation of Gender Action Plans in Ministries, Departments and Agencies (MDAs). The Planning Institute of Jamaica (PIOJ) and the Ministry of Transport, Works & Housing both qualified to use the Gender Equality Certification Stamp. The Stamp signals the commitment of MDAs to the achievement of gender equality and women's empowerment. It was designed to be utilized by organizations that (a) appointed a Gender Focal Point (GFP)¹¹; (b) completed training in gender mainstreaming and (c) developed an Action Plan and received approval within their organizations to implement aspects of the NPGE. To date, a total of 72 MDAs were trained, with 24 GFPs developing and gaining approval for their Action Plans.

A National Report was prepared on the status of implementation of the Beijing Declaration & Platform for Action as well as a follow-up National Report on the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) in response to the concluding comments to the combined 6th & 7th Periodic Report. Continued partnerships to advance the issues of eliminating gender-based violence were augmented through advocacy and representation of the BWA and the PIOJ on various committees such as the Jamaica Crime Observatory /Integrated Crime & Violence Information System (JCO-ICVIS); the National Taskforce against Trafficking in Persons (NATFATIP); the National AIDS Committee (NAC) and the Enabling Environment & Human Rights Committee.

The PIOJ and the Ministry of Foreign Affairs and Foreign Trade led the process of developing the National Outcome Document and the national position on the Post 2015 Development Agenda, and the areas of gender equality and women's empowerment are mainstreamed throughout. Through the process of stakeholder consultation with MDAs, the government has reaffirmed its commitment to ensure women's equal rights, access and opportunities for participation and leadership in the economy, society and political decision-making. These include advocacy for legislated gender quotas to address the lack of proportional representation of women in Parliament, under-representation in local authorities and other positions of leadership and to increase the participation by women in the relevant branches of government.

Eliminating Gender-Based Violence

Collaboration with International Development Partners (IDPs) and the private sector was also strengthened to garner greater technical and financial support for the achievement of

gender equality and women's empowerment. Consultations to address the issue of gender-based violence were spearheaded by the BWA with assistance from non-government organizations (NGOs), other MDAs as well as IDPs such as UN Women. A Communications and Advocacy campaign to promote the elimination of gender-based violence was launched in November 2014. Media engagements to convey powerful anti-violence messages, public fora and exhibitions, and community engagements in seven parishes, were the mechanisms utilized throughout the campaign. These activities were implemented to coincide with the International Day for the Elimination of Violence against Women (IDEWAV) and the 16 Days of Activism. Similarly, consultations with MDAs and NGOs on the draft National Strategic Action Plan to Eliminate Gender-based Violence (NSAP-GBV) were held to facilitate a coordinated approach to prevent and eliminate gender-based and other forms of violence within a human rights-based framework.

In an effort to increase the technical capacity of public servants to implement and monitor programmes to eliminate gender-based violence, staff of the BWA participated in training in harm reduction and sexual health promotion during the year. The BWA in collaboration with the Office of the Public Defender also participated in the revision of a draft Complaints & Response Protocol. This Protocol looks at facilitating a complaints and redress mechanism for victims of gender-based violence.

Sex Disaggregation of Data

During the year, regional training was done on Time Use Surveys to complement previous data analysis training to improve technical capacity to produce gender indicators. The training sponsored by the United Nations Economic Commission for Latin America and the Caribbean (ECLAC), is in keeping with the recommendation of the Beijing Platform for Action to improve data collection on the full contribution of women and men to the economy, including their participation in the informal sector(s).¹² The data are also expected to assist in developing an international classification of activities for time-use statistics that is sensitive to the differences between women and men in remunerated and unremunerated work. Time Use Surveys will also contribute to supporting other areas of technical knowledge and existing data gaps.

Data collection and compilation efforts have been complemented by the maintenance of specific databases to monitor international, regional and national goals on social and economic development. In this regard, the Gender Equality Observatory provided current information on some of Jamaica's most critical social, educational and economic indicators. The Observatory will aid in improving

11. The main responsibility of the Focal Points is to mainstream gender in and throughout their respective MDAs.

12. United Nations, 1996; Platform for Action and the Beijing Declaration; Fourth World Conference on Women, Beijing, China 4–15 September 1995.

the process and analyses of sex disaggregation of statistical data necessary for the development of gender-sensitive programmes and policies.

Women's Social and Economic Empowerment

In order to support women's social and economic empowerment, the BWA in March launched *The Inspiring Change Initiative*. A total of 19 community groups were awarded grants to support their community-based income generating initiatives in craftwork; poultry farming; small produce farming; pastry making, drapery making, social assistance support; care giving as well as institutional strengthening. There was increased community engagement through 162 crisis interventions, 11 health and information wellness fairs, and 11 field visits to BWA affiliated women's groups for monitoring and evaluation of development projects. The BWA in collaboration with the Management Institute of National Development (MIND)¹³ conducted leadership training for members of the Jamaica Household Workers Union to increase capacity for the adoption of ILO Convention 189 - Decent Work for Domestic Workers, which addresses the Decent Work Agenda.

Advocacy, awareness raising and public education towards women's empowerment and the elimination of violence against women were addressed through the School's Education Programme (SEP) in Kingston and St. Andrew, St. James, St. Elizabeth, Manchester and St. Ann. A total of 485 students were reached, of which 361 were females.

The government continued to provide support through annual subventions/grants to the NGO community to implement gender equality and women's empowerment related activities. These efforts assisted the BWA to promote gender-sensitive governance, socio-economic development and improve collaboration to create greater public awareness. In commemoration of International Women's Day, the Women's Resource and Outreach Centre Limited (WROC) in partnership with the United Nations Population Fund (UNFPA), The University of the West Indies' Institute for Gender and Development Studies (IGDS) and the BWA hosted an exposition under the theme *'Celebrating Women and Girls'* at the University of the West Indies, Mona Campus. The Women's Expo also celebrated the anniversaries of the partnering organizations; WROC (31st), IGDS Mona (20th) and the Bureau of Women's Affairs (40th). The exposition featured a range of presentations on pertinent issues related to beauty and image, health and wellness, financial empowerment, training opportunities, gender-based violence among others.

Adolescent Mothers

Support to adolescent mothers in terms of their sexual and reproductive health continued to be offered through the

Women's Centre of Jamaica Foundation (WCJF). The various programmes under the Foundation's purview focused on:

- continuing education for teen mothers 17 years and under
- counselling for “baby fathers” and parents of teen mothers
- counselling and recommendations for young men to be included in the Ministry of Justice's Diversion Programme
- the provision of day-care facilities for babies of teen mothers at nurseries attached to the seven main centres and the 11 established outreach stations.

The Foundation served 1 205 adolescent mothers, 678 of whom were new students. Of these new students, data indicate that 59 had been attending primary/junior high schools, 595 attended traditional and technical high schools and 24 attended other institutions, such as the HEART Trust/NTA, the Jamaican Foundation for Lifelong Learning and the Young Women's Christian Association.

By year end, a total of 656 teen mothers were returned to the formal school system through the implementation of the National Policy for the Reintegration of School-Age Mothers into the Formal School System. The Policy which was approved in 2013 sets out guidelines to ensure that teen mothers are not denied the opportunity to re-enter the formal school system and that they are given the opportunity to continue their education. Services to young fathers were offered through the Baby Fathers Counselling Programme. Some 225 fathers were counselled and referred to other agencies, including the Ministry of Justice Diversion Programme to which nine young men were recommended. Other achievements over the period included training of peer counsellors, 63 of whom were from schools in the Montego Bay and the Kingston Metropolitan Areas.

The WCJF also provided nursery services to some 615 babies at the seven main centres and four outreach sites, facilitating the participation of their mothers in classes at the centres. The Chubby Cheeks nurseries provided care for 50 babies as well as parenting skills for the benefit of working mothers in Kingston and St. Elizabeth. A total of 222 students were enrolled at pre-school facilities in Montego Bay and St. Elizabeth. Ongoing training by the Ministry of Education helped to enhance and build the capacities of the teachers who currently provide service at the preschools. Parenting Education was provided through various initiatives implemented by the WCJF. A week of activities was observed at all centres and outreach sites during the month of November, additionally, sexual and reproductive health sessions targeting

13. Activity supported by funds from The Way Out Project.

males were held at all the sites. During these sessions, the role of men as parents and responsible sexual behaviour were discussed.

Education, Research and Publication

Through its programme of teaching, research/publications outreach and public service, the Institute for Gender and Development Studies (IGDS), Mona Unit continued to advance gender equity and gender mainstreaming to support implementation of Jamaica's NPGE. Achievements of the teaching programme included increased enrolment in the Bachelor of Science degree in Gender and Development Studies, of which 251 students were enrolled. Total enrolment in 15 gender courses was 1 067, with 747 being females. Some 29 students graduated in October 2014 compared with 12 from the two previous cohorts.

Special gender modules and courses were also delivered in the Faculty of Medical Sciences, the Faculty of Science and Technology and the Faculty of Humanities and Education. Guest lectures, conference presentations and interviews were delivered in the Faculty of Social Sciences as well as outside the university to a range of institutions nationally, regionally and internationally. Gender courses were also offered to students registered for the Bachelor of Arts in Early Childhood Education at the Shortwood and Bethlehem Colleges, and the Bachelor of Arts in Literacy at the Moneague College. During the year, the Unit also delivered its first course to the UWI Western Jamaica campus. These courses served to increase awareness of gender issues in education, especially in the development of the curriculum and teaching methodologies. The IGDS also continued to supervise postgraduate students in the Masters and MPhil/PhD programmes.

The research and publications done by the IGDS increased awareness and highlighted the inequalities that are perpetuated by learned gender roles. As part of the Institute's 20th anniversary, two working papers were published with support from partner agencies such as the United Nations Population Fund, which supported the work on Gender Sexual and Reproductive Health, and Friedrich Ebert Stiftung, which supported the work on Gender, Climate Change and Disaster Risk Management. A *Situation Analysis of Household Workers in Jamaica* was one of two major research projects completed by the Unit in 2014. This research was conducted to support Jamaica's ratification and implementation of ILO Convention 189: Decent Work for Domestic Workers' (see chapter on Labour Market). The project was commissioned by UN Women and the Ministry of Labour and Social Security. The second study, *Integrating Age and Gender in Climate Change Adaptation programmes for Rural Development* was commissioned by Agricultural Cooperative Development

International and Volunteers in Overseas Cooperative Assistance (ACDI/VOCA)¹⁴ and USAID. Secondary research findings were used to present a paper on "Women and Work in Jamaica" at the IMF/GOJ seminar held in September.

During the year, the Mona Unit continued research on gender equality in leadership and governance. Phase 2 of the action research project, Advancing Transformational Leadership for Gender Justice in the Caribbean, was funded by the UN Democracy Fund and UN Women, and supported the training of some 79 Caribbean women from six countries at the Antigua-based Caribbean Institute for Women in Leadership (CIWIL). This training will advance the social, economic and political empowerment of women across the Caribbean. In Phase 2, the Mona Unit partnered with various groups to establish the 51% Coalition, which focuses on research and advocacy on gender inequality and promotes the adoption of quotas for women as a Special Temporary Measure to advance gender equity in political and public institutions.

The IGDS continued to provide technical advice and support to mainstreaming gender in national policies and programmes linked to international migration and development, climate change adaptation, and HIV and AIDS. Through the Gender Focal Point network, IGDS partnered with the campus's Gender Task Force to mainstream gender in all plans, programmes and courses offered by the university. The achievements to date include gender sensitization sessions delivered to all faculties and several departments; the appointment of 10 gender focal points across the university and the completion of two research studies on staff and students. Mona's gender mainstreaming model has also been shared with the other IGDS Units at the Cave Hill and St. Augustine campuses as part of a collective IGDS initiative to support the development of a UWI Gender Policy, consistent with UWI's commitment outlined in the 2012–2017 Strategic Plan.

Activities to commemorate International Men's Day on November 19 included a public education forum to promote male participation in education and development. This event helped to set the stage for the fourth International Colloquium on Black Males in Higher Education, scheduled for October 7–9 2015 as a joint collaborative project with the University of Wisconsin, Madison. The Unit also supported activities around International Women's Day on March 8 and participated at the National Conference on Girls' Education hosted by the St. Hugh's High School on November 20.

COMMUNITY DEVELOPMENT

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

14. 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.

TABLE 25.5
JAMAICA SOCIAL INVESTMENT FUND STATUS OF PROJECTS, 2014
 (Value and Cost in \$Million)

Sector	Number Approved	Value of Projects Approved	Total Project Cost	Number Completed Projects	Value of Completed Projects
Social Infrastructure	18	681.2	768.4	27	694.0
Economic Infrastructure	24	544.7	628.0	6	155.1
Social Services	20	178.2	180.7	17	59.8
Organizational Strengthening	3	116.6	125.7	5	6.4
Special Projects	1	0.4	0.4	1	0.6
Equipping	29	367.3	418.2	8	105.5
Research (Consultancy)	1	8.2	8.2	0	0.0
TOTAL	96	1 896.6	2 129.6	64	1 021.4

Note: Value refers to JSIF cost

Total project cost includes the community contribution

Discrepancies are due to rounding

Source: Jamaica Social Investment Fund

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 which focused on improving the social and economic infrastructure of communities and increasing the social capital of persons within communities, groups and institutions. Recognizing the need to broaden the participation of all Jamaicans in the economic development

process and embracing the goals of Vision 2030 Jamaica, JSIF's community development interventions have been crafted to encourage beneficiaries to participate in the national growth agenda.

During the year, JSIF disbursed approximately \$900.0 million for community development activities. Communities contributed approximately \$49.9 million in cash and kind. Some 96 sub-projects were approved for funding, with the majority (43) related to basic infrastructure (schools, roads, water supply) to benefit 3 264 persons; 20 were for capacity building and education/training to benefit 7 013 persons; 3 were for organizational strengthening to benefit 1 239 persons; and 29 for the provision of equipment or furniture to benefit 3 136 persons; and one Entertainment/Tourism

TABLE 25.6
JAMAICA SOCIAL INVESTMENT FUND STATUS OF PROJECTS
 (Value and Cost in \$Million)
 Cumulative 1996–2014

Sector/Area	Number Approved	Value of Projects Approved	Total Project Cost	Number Completed	Value of Completed	Total Project Cost
Social Infrastructure	910	9 764.6	10 899.6	808	7 046.9	7 908.6
Economic Infrastructure	243	3 285.2	3 646.5	207	3 173.6	2 744.5
Social Services	398	1 662.9	2 160.5	232	745.0	1 034.7
Organizational Strengthening	143	332.3	393.6	115	184.4	227.0
Special Projects	11	48.4	50.6	4	22.3	26.7
Equipping	73	478.3	583.0	38	191.5	215.3
Economic Projects	7	22.1	24.8	0	0	0
Research (Consultancy)	1	8.2	8.2	0	0	0
TOTAL	1 786	15 602.0	17 766.8	1 404	11 363.7	12 156.8

Note: "Value" refers to Jamaica Social Investment Fund (JSIF) cost

"Total Project Cost" includes the community contribution

Source: Jamaica Social Investment Fund

Demand Study. A total of 64 sub-projects were completed. The majority (33) of these projects was related to infrastructure development and improvement and benefited 27 818 persons. The other projects involved: the provision of equipment (8) benefiting 3 724 persons; and capacity building, education and training (23) benefiting a total of 1 476 persons (Table 25.5). The infrastructure related projects included construction and rehabilitation of schools (see chapter on Education and Training), health-care facilities, sports facilities, and road and drainage improvements. Socio-economic projects included education and training programmes (see chapter on Education and Training), and agriculture and tourism projects. The agriculture and tourism projects were accomplished through the provision of infrastructure, equipment, and capacity building training to rural community tourism and agricultural enterprises. There were over 1 300 beneficiaries of these interventions. Since inception, JSIF has approved over 1 700 projects, and completed over 1 400 at a total project cost of \$12.2 billion. Of the total project cost, some \$0.8 billion was community contribution (Table 25.6).

Sub-projects were implemented under the following four loan and grant supported projects: Community Investment Project (CIP); European Union Poverty Reduction Programme III (PRP III); Rural Economic Development Initiative (REDI); and Petro Caribe Development Fund (PDF). Under the four projects, JSIF disbursed a total of \$754.9 million linked to 53 sub-projects completed during the year, benefiting a total of 22 522 persons. Under CIP, 25 sub-projects were implemented in rural parishes targeting 14 767 beneficiaries. Building and refurbishing of schools and procurement of school equipment constituted the largest proportion (36.0 per cent) of the sub-projects followed by organizational strengthening (20.0 per cent); roads (16.0 per cent); training (12.0 per cent); capacity building (8.0 per cent); education and training programmes (4.0 per cent); and health-care facilities (4.0 per cent). Eight sub-projects were executed through the PRP III across volatile urban communities in the parishes of St. James, St. Catherine, Kingston and St. Andrew, and Clarendon, targeting 595 beneficiaries. The majority of the sub-projects was executed in schools (75.0 per cent). Twelve sub-projects were implemented in the Agriculture (75.0 per cent) and Tourism (25.0 per cent) sectors through the REDI Project. The project sought to enhance income generation and job creation through the provision of greenhouses and greenhouse equipment, cold storage facilities, and capacity building and training initiatives to improve the technical expertise of the beneficiaries. The interventions benefited a total of 1 373 persons. Through the PDF, eight sanitation sub-projects were completed in primary and all-age schools in the parishes of St. Thomas, St. Catherine, Clarendon, St. Elizabeth and Westmoreland. The interventions involved the replacement of pit latrines with flush toilets, benefiting 5 787 beneficiaries.

A total of 10 sub-projects under the Inner City Basic Services Project (ICBSP) and the Poverty Reduction Programme II which closed in 2013 were finalized during the year. Preparation activities were advanced for the Basic Needs

Trust Fund 7 (BNTF 7), funded by the Caribbean Development Bank. The loan agreement for the Integrated Community Development Project, financed by the World Bank, was finalized in May followed by sensitization and preliminary activities in the targeted 18 communities. In November, JSIF entered into an agreement with the Jamaica Public Service Company (JPS) where the Fund would undertake technical and social activities in targeted informal communities to encourage and assist residents to regularize their electricity supply. Preliminary activities were started to support this project during November and December. The Financing Agreement for the European Union Poverty Reduction Programme IV was also signed by the GOJ in November. The PRP IV will seek to promote economic well-being and enhance quality of life of residents in volatile communities.

The GOJ fully funded a public safety related sub-project in Greenwich Farm. The objective of the sub-project was the removal of zinc fences in the community to be replaced with block and steel walls to provide more secure enclosures around the properties.

The **Social Development Commission (SDC)** is the principal community development agency working with Jamaica's 783 communities. The Commission pursued a programmatic approach to community development using two main strategies—integrated community development strategy and local economic development strategy. The implementation of eight major programmes was geared towards realizing outcomes such as increased people participation in local governance, fostering wealth creation and social protection.

The **Participatory Governance Framework** highlights the relationship between the various levels of governance structures. There was a 9.2 per cent increase in the number of active umbrella groups with the formation of 22 new umbrella structures and the reactivation of 26. The total number of umbrella groups stood at 588, comprising 13 Parish Development Committees (PDCs), 64 Development Area Committees (DACs) and 519 Community Development Committees (CDCs). Some 40.0 per cent (240) of the groups were assessed using the Commission's standardized assessment tool and a corresponding 37.0 per cent (220) was recipients of formal capacity building initiatives, thus enabling them to effectively carry out functions and participate in local governance initiatives and the Local Economic Development Support Programme. The Commission partnered with Local Authorities, Members of Parliament and MDAs to provide capacity building initiatives. Some of the focus activities included social marketing, public relations, event planning, financial management, meeting management, constitutional development, parliamentary procedure, conflict resolution and team dynamics. Some 1 300 civil society organization leaders and members benefited from capacity strengthening trainings.

The **Governance Capacity Grant Fund Programme** seeks to improve the operations of governance groups by

financing activities that result in capacity building and the facilitation of partnerships. Since the establishment of the Fund, 52 groups have received funding of approximately \$3.4 million. The Fund facilitated the implementation of projects in various parishes, namely St. Thomas, Portland, St. Mary, St. Ann, Trelawny, St. Elizabeth, Manchester, Westmoreland, Clarendon and St. Catherine. In Kingston and St. Andrew (KSA), the Ferry CDC enhanced the proposal writing skills of its members. In St. Elizabeth, the Potsdam Community used the funds to mobilise and increase membership for the Community Development Committee while, the Claremont Development Area Committee, in St. Ann, developed and published its Governance manual. The Somerset CDC in Portland through its completion of capacity building activities planned and executed a health and information fair which allowed access to services that otherwise would have been inaccessible to the community. This activity also resulted in the wider participation of citizens within the CDC. The National Association of PDCs (NAPDEC) through its awarded grant funding was able to strengthen PDCs in the “Quickbook Software” Training. This will see PDCs more competent in managing their own funds and subsequently improving administrative and planning functions of the groups.

The *Parish Inter-Agency Network programme* was designed to improve the quality of service delivery to residents through effective and efficient collaboration among local service providers. There is a functional Inter-Agency Network (IAN) in 12 parishes with meetings being held monthly, bimonthly or quarterly, thereby providing fora for agencies to share information and identify upcoming activities for collaboration. To date, 65 such meetings have been held with an average of 10 member agencies from both the private and public sector. These included the Jamaica Fire Brigade, HEART Trust/NTA, National Housing Trust, Jamaica Foundation for Lifelong Learning, Jamaica Public Service, Local Authorities, Parish Development Committees, Jamaica 4H Club, Jamaica Constabulary Force and Tax Administration Jamaica among others. Capacity building workshops were conducted with member agencies in five parishes (Clarendon, Trelawny, Westmoreland, St. James and St. Ann) with a focus on strategic planning, state protocol and customer service. Member agencies collaborated to host 52 joined up interventions such as social service fairs, an Easter treat for a Children’s Home in Trelawny and a 5k Freedom Run/Walk in St. Catherine with proceeds going to the Strathmore Children’s Home.

The *Community Research and Database Programme* produces and updates data and information that are needed for local and national planning. A total of 13 Community Profiles and 7 Development Area (DA) Profiles were completed resulting in 670 Community Profiles available for influencing development planning and design. Asset mapping was done for 136 communities and asset maps created for 181 communities using the Geographic Information Systems (GIS) software. Work continued on the development of the GIS database and the completion of 85 community boundary

shape files towards the establishment of an accurate, reliable national grid of communities. Additionally, focus was given to the capacity development of staff and community representatives in research methodologies. In addition to the youth, 321 community representatives and National Youth Service participants were engaged in the data collection activities conducted in the parishes of Hanover, St. Andrew, St. Catherine, St. Elizabeth, St. James, Portland, St. Mary, St. Ann and St. Thomas. The SDC also undertook research projects for MDAs, such as the Ministry of National Security/Jamaica Constabulary Force, and the Clarendon and St. Elizabeth Parish Councils. The Commission continued the task of establishing a community and district listing by reviewing and redefining the community borders and boundaries for all 783 communities islandwide, with 95.0 per cent of the borders having been reviewed to date.

The *Priority Planning and Projects Development Programme* entails a systematic process used to engage communities in determining and defining immediate, short and long-term priority issues and remedial activities. The resulting plan will reflect a suite of actions from which project ideas and formulation will emerge and the requisite funding sources and stakeholders engaged. The Community Priority Plan (CPP) is a document formulated from community engagement using mixed methodology that identifies priority issues facing communities and possible responses within the context of available resources. There are 301 such plans available, representing a 38.4 per cent coverage. Information from the CPPs reveals that there are over 47 priority issues that affect communities, with the top three being unemployment (18.0 per cent); poor public infrastructure (roads, drains, bridges, gully maintenance) {13.0 per cent}; and inadequate access to piped water (9.0 per cent). Other issues include no or limited skill level, low literacy rates, poor parenting skills, and crime and violence. Some 115 projects have been identified from existing Community Priority Plans with major categories being: physical infrastructure (48); educational/skills training (37); economic enablement (25); social projects (3); and 1 each for environmental and cultural/heritage activities. These projects were submitted to local and international funders, and 49.5 per cent or 57 implemented (or are being implemented) with a total project value of just over \$130.4 million, while another 15.6 per cent has been approved and is to be implemented. Training was provided for staff and community representatives in facilitation skills, project planning, business planning, proposal writing, project management and maintenance, event planning, money management, fundraising and participatory learning action.

The *Local Economic Development Support Programme (LEDSP)* is focused on the development of interventions aimed at bolstering viable economic enterprises and the shaping of a culture of productivity that will result in growth in the local economy primarily at the community level. During the period, all field staff members participated in capacity building sessions on the LEDSP, with a cadre of 27 officers formally trained in the social entrepreneurship programme

at the Mona School of Business and Management. Nineteen business development seminars and 12 business development fairs were held with community representatives. Participating agencies included: the Department of Co-operatives and Friendly Societies, Jamaica Intellectual Property Organization, the Bureau of Standards Jamaica, Local Parish Councils, Tax Administration of Jamaica, HEART Trust/NTA, National Youth Service, National Centre for Youth Development, Jamaica 4H Club, and Rural Agricultural Development Authority among others. Some 37 Business Development Plans have been developed with communities for various local economic initiatives such as juice making (e.g. Grotto CDC Social Enterprise Boost Natural Juice Initiative – Westmoreland) and beekeeping (Grove Place Beekeeping Project – Manchester). These plans were developed with support from partners such as the Business Entrepreneurial Empowerment Programme. The Commission also established a database of local economic initiatives to facilitate networking, funding and increased efficiency among the local players. During the year, 30 new community economic initiatives were identified resulting in a total of 74 initiatives that are being supported by the Commission and other local partners. Agriculture (55.0 per cent) is the most common area of economic enterprise with other areas such as community tourism, pastry making and water harvesting being pursued. Parish teams worked with the community groups to submit 29 project proposals for local economic development initiatives to various funding agencies over the period, of which 14 were approved with a total value of over \$40.5 million.

The ***Community Action for the Improvement in Education Programme*** is designed to improve the participation and partnership of communities with educational facilities in their environs thereby resulting in improved educational outcomes. To this end, SDC Officers in partnership with the school boards, Principals, PTAs, and Past Student Associations along with other stakeholders supported the development of School Improvement Plans (SIPs) and related projects for implementation. Twenty-one SIPs were developed and 72 projects/activities emanating from these plans were undertaken. The interventions undertaken are expected to result in improvements in the learning experience and educational attainment of students in the targeted schools in the medium to long-term. However, some short-term results have already been identified, such as increased parental involvement and improved class attendance.

The ***Sports for Community Development Programme*** aims to promote social inclusion, reduce barriers, increase participation and promote personal, social and community development. Two main annual events were held in the form

of national communities' cricket and netball competitions. Under the theme, "Think Community...Think Business", the 9th staging of the National Community Twenty/Twenty Cricket Competition was held with 268 teams participating. The winning teams are required to use 15.0 per cent of the prize money at both the parish and national levels to implement a community project. National Prize winners for this year were Race Course from Clarendon (\$1.2 million), Old Harbour from St. Catherine (\$600 000.00), Rose Hall\ All Century from St. Elizabeth (\$300 000.00) and Content Gardens from St. Ann (\$150 000.00). Some 143 teams participated in the second staging of the National Community Netball Competition. Parish winners were Mandeville United from Manchester (\$500 000.00), Liguanea United from Kingston and St. Andrew (\$250 000.00) and Catherine Mount from St. James (\$125 000.00). Winning teams were also required to use 10.0 per cent of their prize money to implement a community project.

Implementation of the **Community Renewal Programme (CRP)** continued with support from a range of partners including international development partners, NGOs, government agencies and private sector institutions. Projects were being undertaken under the Poverty Reduction Programme IV in 40 CRP communities across the parishes of St. James, St. Catherine, Clarendon and KSA. These projects focused on infrastructure development, social development and economic empowerment. Phase two of the Community Empowerment and Transformation Project (COMET II) commenced implementing projects in security and justice, governance, economic empowerment and climate change in another 25 CRP communities across the parishes of St. James, Clarendon, St. Catherine and KSA. The major activities conducted under each component of the programmes are as follows:

1. *Youth Development* – supported the participation of more than 15 youth from CRP communities in the annual St. Andrew Southern Police Youth Summer Camp
2. *Safety and Justice* – supported SDC and JCF in the development of Police Score Cards¹⁵ in eight CRP communities
3. *Social Transformation*
 - a. Continued implementation of the Jamaica Foundation for Lifelong Learning Literacy and Numeracy Programme in Majesty Gardens
 - b. Coordinated the execution of six health fairs in target communities benefiting over 1 700 community members

15. The police score card is a tool to be used to grade the performance of police officers by community residents. The responses will be used by the Community Safety and Security Branch of the Jamaica Constabulary Force to measure performance of officers and improve the quality of service at the community level.

- c. Facilitated the implementation of the Gang Demobilization Programme conducted by the Peace Management Initiative in Majesty Gardens that benefited 149 at-risk youth (89 males)
 - d. Supported training of Environmental Wardens in West Kingston through the Peace and Love in Society NGO
 - e. Facilitated parenting and stress management sessions in Parade Garden through the Art of Living Foundation
 - f. Facilitated the engagement of high-risk individuals to explore alternative pathways through the development of eight social enterprise models through the University of the West Indies Office of Social Entrepreneurship
4. *Governance*
- a. Held CRP sensitization sessions in 13 target communities
 - b. Supported three CDCs in capacity building exercises and in the execution of local events
 - c. Completed the draft indicator framework for the programme
5. *Socio-Economic Development*
- a. Completion of the Jamaica Business Development Corporation (JBDC) socio-economic development project (TALE Project) for 159 residents from Majesty Gardens
 - b. Coordinated the execution of Gas Pro “Street Style Cook-up” in the communities of Southside and Waterhouse
 - c. Supported the participation of community entrepreneurs in the Trench Town Festival, the Jamaica Business Development Company Entrepreneurship Conference and the SDC local economic development fair
 - d. Facilitated the execution of the Environmental Health Foundation (EHF) parenting and nutrition programme for 129 community members from Majesty Gardens benefiting
 - e. Initiated the implementation of an alternative energy project in Majesty Gardens through the EHF.

LOCAL GOVERNMENT

The Ministry of Local Government and Community Development (MLGCD) continued to strengthen its capacity as well as that of local authorities (LAs) and agencies to adopt a new paradigm of participatory local governance in

keeping with the local government reform programme. The initiatives implemented during the year to support Local Government Reform were: the Fire Safety Programme; Property Tax Programme; Energy Efficiency Programme; Infrastructure Development Programme; a programme to improve the development application approval process; the Community Empowerment and Development Programme; Local Economic Development Programme (as part of community development); and the programme for legislative reform and improved institutional capacity of the MLGCD, LAs and agencies.

1. Fire Safety and Security

The capacity of fire services was improved through repairs to a fire boat and the Brown’s Town Fire Station. Additionally, three fire trucks were purchased, four fire trucks were repaired and two donated by the Japanese government. These nine additional vehicles will enable the Jamaica Fire Brigade to provide better service through improved response times.

2. Community Empowerment and Development

During the year, strides were made in enhancing civil society participation in local governance. The ministry collaborated with the SDC to engage citizens of Portmore via the Portmore Citizens Advisory Council (PCAC) and citizen focus groups. A meeting was convened with the PCAC to discuss the Charter for the Municipality of Portmore. This charter is currently with the Office of the Parliamentary Council (OPC). Additionally, 11 consultation sessions were held across the parishes of Portland, St. Mary, St. Thomas, Kingston and St. Andrew, St. Catherine, St. Ann, Trelawny, Westmoreland and St. Elizabeth regarding various social issues ranging from traffic management, safety and protection to water supply and housing. Two cohorts of municipal police officers (totalling 45 officers) were trained during the period and deployed within their respective parishes to support the efforts of the local authorities in maintaining public order, enforcing municipal laws and regulations, supporting revenue generating efforts, and assisting in disaster management activities.

The *Parish Development Committees (PDCs)* undertook a number of activities such as engaging in programmes and projects which fostered community empowerment; facilitating meetings with citizens associations; participating in scheduled meetings held by their respective parish councils; and attending capacity building workshops. Some of the major activities undertaken by PDCs included the following:

- The *St. Catherine PDC* held the St. Catherine Local Government School’s Challenge Quiz which focused on sensitizing students about the PDC and the local governance framework. It also encouraged students to get involved in their community organizations.
- The *Clarendon PDC* monitored two projects. One of these projects was the Pleasant Valley Reforestation Project which was sponsored by the Forestry

Conservation Fund. The second project involved the construction of water harvesting infrastructure and improvement of the community's adaptive capacity to natural hazards. This was funded by the Australian Aid Government through the Global Environment Facility. The PDC also assisted with the planning and implementation of Milk River DAC Health and Expo at the Rest Primary and Junior High.

- The **St. Elizabeth PDC** coordinated five DAC community visioning sessions in Black River, Junction, Balacava, Santa Cruz and New Market for the St. Elizabeth Local Sustainable Development Plan. Over 40 persons attended each session where concerns, issues and solutions were discussed and documented and will be incorporated into the plan. Additionally, more than 50 persons from the PDC and DAC participated in the International Beach Clean-up Day on September 20. The PDC also coordinated and participated in the ChikV Parish Clean-up initiative held by the St. Elizabeth Parish Council in October.
- The **Westmoreland PDC** organized and coordinated activities with the St. James Parish Council for the Western Economic Conference held under the theme “Improving Capacity for Sustainable Growth and Development” on November 26. The forum focused on empowering local groups within the western parishes to develop and implement an economic model to improve their way of life. The PDC also assisted with the coordination of the Westmoreland Parish Show which was held on November 30. The show raised awareness of goods and services available within the parish and also promoted “Brand Westmoreland”. There were 15 display booths and over 200 attendees.
- The **Hanover PDC** held a back-to-school treat in August where approximately 100 students were provided with school supplies, among other things. The PDC also coordinated the creation of a parking lot area at the Esher Primary School out of an area which was overgrown with grass and which posed a hazard to the safety and security of students.
- The **St. Mary PDC** coordinated a coastal clean-up day on Paggee Beach on September 20, which included 70 persons from Jamaica National Foundation ACTION Volunteers.
- The **St. James PDC** in collaboration with the St. James Parish Council continued its consultative process with the citizens and convened a town hall meeting to address major concerns including poor water supply, road conditions and malfunctioning street lights.

Implementation of the **Enhancing Civil Society Participation in Local Governance for Community Safety project** continued. Equipment valued at approximately \$1.1

million was used to furnish each Parish Safety and Security Committee (PSSC) to facilitate the hosting of capacity building workshops and public fora. The equipment included projectors, digital cameras, laptop computers and handbooks to assist in the work of the PSSC. There was also the completion of a post project analysis and the development of a draft sustainability plan to ensure the continuity of these committees. The Manchester PSSC held discussions with communities on dispute resolution and child abuse which led to collaboration with stakeholders to build a half-way house for children and persons exposed to domestic violence. Additionally, the Clarendon PSSC implemented a school bus system in collaboration with bus operators/owners and the Transport Authority to transport students safely to and from three pilot schools.

3. Local Economic Development (LED)

Jamaica is one of the countries in the region that has been receiving support under the Caribbean Local Economic Development Programme (CARILED). The goal of the programme is to stimulate sustainable development and good civic order within the respective jurisdictions. To that end, seven projects were approved for a pilot in four parishes, namely:

- Milk River Project in Clarendon
- Riverton Recycling Project in Kingston and St. Andrew
- New Roads Rest Stop and Agro-Processing Project in Westmoreland
- Water Wheel Agricultural Council Greenhouse and Seedling Project in Westmoreland
- Beeston Spring Organic Farming and Agro Project in Westmoreland
- Cecil Charlton Park Redevelopment Project in Manchester
- White Shop Agro-Bizz and Agro-Processing Project (Phase I) in Clarendon.

These projects will generate lessons, approaches and practices for LED that will inform the improvement of existing country-based policies, regulations and programmes on LED, and create new tools and management models for dissemination throughout the entire Commonwealth Caribbean region.

4. Infrastructure Development

The LAs undertook various activities to rehabilitate markets, drains, and infirmaries as stated below:

- Rehabilitation of the May Pen market and the Black River Market Phase III

- Completion of work on the St. Thomas infirmary's sewage treatment system
- Completion of fencing at the Manchester and St. James Infirmaries
- Provision of bathrooms equipped with raised showers, sturdy face basins, raised toilets as well as handlebars which make these areas user-friendly for persons with disabilities (PWDs) at the Manchester, St. Catherine, St. Thomas, Westmoreland, St. Ann, Trelawny and Hanover infirmaries.

5. Property Tax

For the period January to December 2014, approximately \$6.2 billion was collected from property taxes, approximately \$563.0 million dollars more than the amount collected in the period January to December 2013. The improvement in collections was attributed to an increased collaboration with the LAs and Tax Administration Jamaica through regular meetings and weekly monitoring of collection. Measures included:

- Continuation of the special project teams with representatives located in all the parishes (parish and regional coordinators overseeing the work based on monthly targets established for each collectorate)
- Special contract officers to focus on arrears collections
- Out-stations during the week and at select locations on Saturdays
- Stormings – concentration of compliance officers in defined geographic areas to issue summonses, reminders and arrange for payments by delinquents
- Active support from local authorities through town hall meetings, requirements for compliance certificates to accompany applications for property related approvals as well as advertisements
- Increased court action through the provision of additional court days which were requested as well as increasing the number of summonses being served.

6. Development Approval Process

The preparation of development plans by LAs has been identified as a benchmark to improve Jamaica's standard under the Caribbean Growth Forum. During the period, Clarendon, St. Catherine, St. Thomas, Westmoreland and Trelawny LAs commenced the Local Sustainable Development Planning (LSDP) process. The Clarendon LA has developed a draft LSDP while funding was being sought to aid in the completion of these local sustainable development plans. Geographic Information System (GIS) was used to aid LAs in collecting spatial data for the LSDP preparation process. This resulted in the Portmore Municipal Council completing the collection

and collation of local geospatial data and using this data to inform the land use component of its LSDP.

At the end of August, the Application Management and Data Automation (AMANDA) system was fully implemented in all LAs. This software will, among other things, enhance the data management of planning and building applications in the LAs and referral agencies. Wide Area Network (WAN) was introduced in 10 LAs: Kingston and St. Andrew Corporation, Portmore, St. Catherine, Clarendon, Manchester, Trelawny, St. Mary, St. Elizabeth, Portland, and Hanover to strengthen the connection between the ministry and its portfolio entities. Additionally, all LAs now have fully commissioned and functional websites with an integrated web portal (localauthorities.gov.jm) and the ministry has commenced the standardization of all LAs email addresses to the government's *.gov.jm* domain.

7. Legislative Reform and Improved Institutional Capacity of the MLGCD, LAs and Agencies

The ministry continued to work with the Attorney General's Chambers and the Office of the Parliamentary Counsel (OPC) in preparing the Bills, which seek to strengthen (i) the LAs' scope and powers, (ii) the financing and financial management framework of LAs and (iii) the management of human resources in the LAs. The draft *Local Government (Unified Services) and Employment Act* and the draft *Local Government Financing and Financial Management Act* were being reviewed by the Attorney General while the draft Local Governance Act was being reviewed by the ministry. Other legislative reforms in the sector included:

- *Promulgation of Constitution (Amendment) (Local Government) Bill*: The Constitution Amendment Bill which seeks to entrench Local Government in the Constitution was tabled in Parliament in September for debate. The passage of the Bill is to implement a key recommendation of the consultative process of the National Advisory Council (NAC).
- *National Building Bill*: The latest draft was before the Legislative Committee of Cabinet for review. Fundamentally, it will facilitate the adoption and efficient application of national building standards to be called the National Building Code of Jamaica to ensure safety in the built environment, enhance amenities and promote sustainable development. The Bill will seek to repeal the Kingston and St. Andrew Building Act of 1883 and the Parish Councils Building Act of 1908 and make new provisions for the regulation of the building industry.
- *Disaster Management Bill*: The Bill was tabled in Parliament on July 15, and passed in the House of Representatives on October 7. The bill seeks to strengthen the country's overall national disaster preparedness, emergency management

and response processes and mechanisms through a range of measures. These measures include: giving recognition to existing organizational structures such as the National Disaster Committee, Parish Disaster Committees, and Zonal Committees, with their roles and functions clearly established; provisions to legally evacuate persons identified as being at risk, based on their location; identifying and earmarking high-risk areas as especially vulnerable areas; and financing the National Disaster Fund (NDF).

Actions aimed at improved institutional capacity included:

- *Establishment of Municipal Court:* In an effort to improve civic order and have a more focused and consistent municipal enforcement environment, the proposal for a Municipal Court was presented to key stakeholders. This resulted in the Chief Justice giving directives to the Resident Magistrates to explore with the local authorities a specific day of the week for municipal matters to be heard. During the review period, four councils used the facilities for Day-in-Court arrangements.
- *International Collaboration:* The Ministry of Local Government supported the Caribbean Forum of Local Government Ministers (CFLGM) to continue to promote and foster good local governance throughout the region. It promoted inter-regional exchange of ideas and good practices as well as provided region-wide clarity on issues relating to local government development. Acting as the CFLGM Secretariat, the ministry partnered with regional governments and international development partners and lobbied for recognition of the agreement establishing the CFLGM. The MLGCD also engaged member territories on actions within their respective Cabinets and discussed with CARICOM the challenges experienced in seeking recognition of the CFLGM by that body. Following a meeting in The Bahamas in August, the ministry prepared an action plan which it is currently using to guide the implementation of various regional undertakings.

SOCIAL PROTECTION

In July the government, through the PIOJ, launched the first comprehensive Social Protection Strategy, as the guiding framework for social protection interventions in the country. The Strategy had been developed with the support of the GOJ/World Bank Social Protection Project, and involved extensive research and best practice study, as well as stakeholder input. The core of the Strategy is a rights-based approach to social security within a social risk management paradigm, with a focus on promotive, preventive, mitigative, protective and transformative interventions, carried out by public and private actors. The Strategy further reinforces the Vision 2030 Jamaica National and Sector Development plans for Effective Social Protection. The institutional framework to support the

implementation of the Social Protection Strategy was being put in place by year end, with the convening of a multi-stakeholder body, the National Social Protection Committee in November.

The focus on social protection continued to prioritize vulnerable groups, with an emphasis on inclusion and economic and social participation. Under the management of the Ministry of Labour and Social Security, several projects were advanced. Among these, the Programme of Advancement Through Health and Education (PATH) continued to provide cash transfers and other benefits to identified poor families (see Social Assistance). The GOJ/World Bank Social Protection Project (SPP) continued to support institutional strengthening and programme development in the areas of case management, graduation strategies, process evaluation and cash transfers. The aligned Steps-to-Work programme, intended to be a key feature of the exit strategies for PATH households, received support for client stipends from the SPP. The project funding was effected through an Additional Financing loan to further support the social protection priorities (see chapter on Official Development Assistance). Another project supported by the World Bank was the Social and Economic Inclusion of Persons with Disabilities, a grant programme focusing on skills training and job placement.

The Inter-American Development Bank (IDB) continued its support to the improvement of the lives of persons with disabilities through the registration of clients with the Jamaica Council for Persons with Disabilities. Other aspects of that project were training of staff, social workers and parents, institutional strengthening, and procurement of assistive aids. Under this project, some 30 000 clients have been registered as persons with disabilities, through an islandwide thrust involving family and organizational input. The IDB also supported parenting interventions for families on PATH, through the initiation of a pilot of a selective parenting programme for parents of children aged 2 to 6 years. Other aspects of social protection support through IDB resources included institutional strengthening and scoping of the Electronic Labour Exchange, investigation of alternative payment mechanisms, and support to labour market outcomes. The IDB also supported the further development of the School Feeding Policy, including a pilot of a management information system.

In other areas of support by the international partners, the United Nations Development Programme (UNDP) supported a Social Protection and Poverty Reduction Study Tour to Chile and Peru in October. At a cost of some \$9.0 million, the UNDP in collaboration with the International Policy Centre for Inclusive Growth, facilitated a Jamaican delegation from the PIOJ and MLSS with the opportunity to explore existing models and to engage in dialogue with technocrats and practitioners in the field of social protection. Additional support to the development of the social protection capacity in the country was afforded through the European Union Social Protection Expert Facility (SOCIEUX) to CARIFORUM

TABLE 25.7A
PATH BENEFICIARIES BY PARISH AND CATEGORY
REGISTERED, DECEMBER 2014

PARISH	Health (0–under 6 yrs)	Education (6–17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston	2 240	9 779	1 907	594	71	360	653	15 604
St. Andrew	6 610	28 889	6 495	1 544	220	1 252	1 971	46 981
St. Thomas	3 027	11 234	2 994	824	111	816	304	19 310
Portland	2 504	8 737	3 021	616	91	472	768	16 209
St. Mary	3 449	14 025	4 140	784	106	853	510	23 867
St. Ann	2 329	14 246	5 020	784	52	1 020	915	24 366
Trelawny	2 587	9 407	2 742	416	70	452	445	16 119
St. James	2 498	12 225	2 881	553	59	655	1 291	20 162
Hanover	2 397	8 354	3 288	659	70	535	618	15 921
Westmoreland	3 658	15 206	4 747	877	127	933	342	25 890
St. Elizabeth	2 481	15 381	6 364	1 005	136	981	501	26 849
Manchester	1 912	11 300	4 442	673	14	860	648	19 849
Clarendon	7 098	27 997	8 217	1 503	306	1 162	942	47 225
St. Catherine	8 083	33 712	8 097	1 582	176	1 361	1 388	54 399
TOTAL	50 873	220 492	64 355	12 414	1 609	11 712	11 296	372 751

Source: Ministry of Labour and Social Security

countries. Through this assistance, which amounted to some €20 650.00, the PIOJ hosted two one-week workshops for public sector officers in June and November; the first on Financing of Social Protection, and the second on Monitoring and Evaluation of Social Protection Policies and Programmes.

Advances were made within the year on the finalization of proposed reforms to the public service pension schemes. A White Paper having been tabled by the Ministry of Finance and Planning previously, the reforms were approved by the

Cabinet and steps taken to revise the pertinent legislation. Initial steps towards the development of an Earnings Database were taken, with the support of the SPP.

Social Assistance

The Programme of Advancement Through Health and Education (PATH) had a registration of 372 751 beneficiaries at the end of December, representing some 13.7 per cent of the population. The figure showed a modest 0.4 per cent increase

TABLE 25.7B
PATH BENEFICIARIES BY PARISH AND CATEGORY
PAID, DECEMBER 2014

PARISH	Health (0–under 6 yrs)	Education (6–17 yrs)	Elderly	Disability	Pregnant/ Lactating	Adult Poor	Poor Relief/PAD	TOTAL
Kingston	2 175	7 426	1 583	594	71	206	653	12 708
St. Andrew	6 407	21 824	5 505	1 544	220	716	1 971	38 187
St. Thomas	2 955	8 964	2 710	824	111	616	304	16 484
Portland	2 469	7 430	2 799	616	91	373	768	14 546
St. Mary	3 387	11 042	3 894	784	106	693	510	20 416
St. Ann	2 234	10 454	4 436	784	52	747	915	19 622
Trelawny	2 559	7 768	2 509	416	70	362	445	14 129
St. James	2 427	9 127	2 455	553	59	410	1 291	16 322
Hanover	2 330	6 686	2 941	659	70	390	618	13 694
Westmoreland	3 556	12 415	4 231	877	127	650	342	22 198
St. Elizabeth	2 410	12 226	5 888	1 005	136	757	501	22 923
Manchester	1 863	10 100	4 029	673	14	654	648	17 981
Clarendon	6 974	23 283	7 703	1 503	306	864	942	41 575
St. Catherine	7 881	26 173	6 961	1 582	176	902	1 388	45 063
TOTAL	49 627	174 918	57 644	12 414	1 609	8 340	11 296	315 848

Source: Ministry of Labour and Social Security

TABLE 25.8
BENEFICIARIES OF PUBLIC ASSISTANCE BY PROGRAMME AND PARISH, 2014

PARISH	REHABILITATION		COMPASSIONATE		EMERGENCY		EDUCATION SOCIAL INTERVENTION		TOTAL	
	No.	Amount (\$)	No.	Amount (\$)	No.	Amount (\$)	No.	Amount (\$)	No.	Amount (\$)
Kingston & St. Andrew	522	10 503 519.65	4 238	82 348 466	147	3 201 297.99	487	8 669 176	5 394	104 722 460
St. Thomas	131	2 892 200	600	13 238 277.29	8	174 241	115	2 299 617	854	18 604 335
Portland	94	1 958 942	340	7 336 725	26	485 000	9	203 540	469	9 984 207
St. Mary	13	317 950	166	4 202 400	36	575 184	12	365 597	227	5 461 131
St. Ann	68	1 482 650	63	1 381 802.16	18	293 604	1	30 000	150	1 705 406
Trelawny	32	1 078 580	67	1 629 400	20	390 076	23	343 035	162	3 441 091
St. James	68	1 305 833	70	1 895 544	18	315 000	15	218 510	171	3 734 887
Hanover	24	473 435	103	2 558 300	11	220 597	5	126 510	143	3 378 842
Westmoreland	25	486 530	92	2 013 900	26	447 456	17	377 150	160	1 311 136
St. Elizabeth	25	469 200	49	1 285 280	30	803 239.70	10	86 860	114	2 644 580
Manchester	11	287 800	55	1 531 900	12	210 000	1	30 000	79	2 059 700
Clarendon	27	985 000	18	530 000	9	220 000	1	50 000	55	1 785 000
St. Catherine	5	133 020	41	897 000	23	435 000	33	403 165	102	1 868 185
Total	1 065	20 892 009.65	5 902	118 835 094.45	384	7 770 695	729	13 203 160	8 080	160 700 959.79

Source: Ministry of Labour and Social Security

relative to the corresponding data for the previous year; however, there was a marked increase in registration of Adult Poor clients, by 48.2 per cent. On the other hand there were decreases in the number of registered children under six years of age, and pregnant and lactating women. The parish of St. Catherine recorded the largest proportion of PATH beneficiaries (14.3 per cent), followed by Clarendon (12.6 per cent). Table 25.7A provides the details. There were 271 365 children in the health and education categories, followed by 64 355 in the Elderly category. In the December payment period, 315 848 persons received their benefit (Table 25.7B). The difference between registered and paid beneficiaries for the programme categories was due to compliance and administrative issues. Some \$795.6 million was expended on benefits in this payment period. For the calendar year, PATH spent some \$4.23 billion over the six payment periods. In August, the second phase of a benefit increase was effected, improving benefit levels by some 15.0 per cent for all categories.

PATH continued to support beneficiary families through other transfers. These included the post-secondary grants and transportation allowances. Some \$29.8 million was disbursed to post-secondary students, with allocations ranging between \$15 000.00 and \$50 000.00 each, depending on the level of study. A Transport Allowance was also piloted in the year, over the months April to June, in an effort to impact compliance rates in some selected schools. Some 3 093 students benefited from the pilot, which targeted chronically non-compliant PATH beneficiaries. By the end of December, a total of 10 353 students had received some \$44.7 million from this allowance.

The Public Assistance Division of the MLSS facilitates and manages the Rehabilitation Grant Programme, which

includes the Rehabilitation Grant, Compassionate Grant, Emergency Grant, as well as Social Intervention grants (Table 25.8). For the review year, a total of \$160.7 million was spent on public assistance. Some \$20.9 million was expended on Rehabilitation Grants to 1 065 persons across the island. About half of this amount was received by clients in Kingston and St. Andrew. With respect to Compassionate Grants, the value expended was \$118.8 million, in support of 5 902 clients. Within this grant category, some \$13.2 million went to St. Thomas clients, a significant proportion when compared with the other parishes. Emergency Grants were provided to 384 clients, to the tune of \$7.8 million. Social Intervention Grants were paid to 729 clients, at a value of \$13.2 million, with Kingston and St. Andrew, and St. Thomas accounting for over \$11.0 million of the amount.

Poor Relief services islandwide continued to be given oversight through the Board of Supervision (BOS). Under the Poor Relief Act, the BOS provides for the care and protection of registered poor persons, through several programmes effected through the Parish Councils across the island. Services are provided to Outdoor, Indoor and Temporary Poor categories. Provisions are also made for homeless persons, other indigent persons, and the education of children. At the end of December, there were 12 088 registered persons on the **Outdoor** rolls, 6 237 of whom were female. Kingston and St. Andrew had the majority, at 2 510 (1 366 female), followed by St. Catherine with 1 407 (721 male), and St. James with 1 262 (659 male). Of the Outdoor Poor population, there were 438 persons (227 male) under 20 years of age; 1 796 persons (1 000 female) between 20 and 39 years; 3 451 persons (1 848 female) between 40 and 59 years; and 6 403 persons 60 years and older (3 225 male). This latter category (the elderly)

TABLE 25.9
NATIONAL INSURANCE PENSIONS AND EMPLOYMENT
INJURY BENEFITS, NUMBER OF BENEFICIARIES, 2014

TYPE OF BENEFIT	NO. OF RECIPIENTS
Old Age	76 036
Invalidity	6 371
Widows/Widowers	19 049
Orphan/Special Child	63
Special Anniversary	11
Employment Injury/Disablement	1 613
Sugar Workers	15
TOTAL	103 158

Source: Ministry of Labour and Social Security

constituted 52.9 per cent of the total population of outdoor clients. A total of \$76.6 million was expended on the care and provisions for the Outdoor Poor over the calendar year. Of this amount, the main expenditure items were School Appliances (educational supplies to children) at \$24.0 million, the Dole at \$22.5 million, and Transportation at \$9.1 million.

Indoor Poor Relief is provided through 13 residential institutions, inclusive of the Kingston and St. Andrew Golden Age Home. The Indoor Poor population at the end of December was 1 462 persons (861 male). Of this number, 32.4 per cent was in Kingston and St. Andrew. Clarendon followed with 136 persons (78 male), then St. Catherine with 122 persons (85 male). St. James had the next largest number, with 112 persons (63 male). Of the total population of residential care clients, 94 were between the ages of 20 and 39 years; some 349 were between 40 and 59 years of age; and 1 019 were 60 years and older. The elderly category therefore constituted 69.7 per cent of the total, with elderly males accounting for 71.5 per cent of all males, and 42.1 per cent of the total. Expenditure on the Indoor programme was recorded at \$296.2 million at year end, with the categories of Food (\$119.2 million), Utilities (\$57.6 million), and Building and Upkeep (\$52.0 million) being the largest expenditure items in total. Of the total amount spent, the Kingston and St. Andrew programme expended 38.4 per cent.

Temporary Poor Relief was received by 468 clients during the year (236 female), with an expenditure of \$4.4 million. The majority of these clients (118 persons, 66 male) was served in the parish of Clarendon. Poor Relief services were also provided to 353 **children** (191 male) in their own names, and 3 559 children (1 794 female) as dependents of the registered poor. There were no children living in residential institutions managed by the BOS. The population of **homeless** served by the BOS was recorded at 1 465 clients (1 206 male). Of the number, only 164 (139 male) were on the Poor Relief register. Some 509 persons (412 male) received shelter care, while 452 (368 male) received other care services. The largest proportion of street persons (homeless) were found

in Kingston and St. Andrew (52.0 per cent), followed by St. James with 15.2 per cent.

There has been no budget allocation to **Indigent Housing** for several years. However, the BOS received support in this area from sources including the Constituency Development Fund (CDF), Food For the Poor and the Poor Relief Imprest system. This enabled the expenditure of \$78.3 million on the building and repair of several houses. Through the CDF, some 732 Poor Relief clients in Manchester and St. Elizabeth were assisted with housing needs. Some 74 new housing units were delivered through Food For the Poor to clients in several parishes. Additionally, 81 units received repairs through the Poor Relief Departments islandwide. Some 887 families were said to have benefited from new units or repairs through the joint efforts.

Non-government support to the BOS, including from organizations and private individuals amounted to \$35.9 million to the Indoor programme, and \$48.0 million to the Outdoor programme. These voluntary contributions supported the provision of services islandwide. Notable achievements for the year included: improved diets through gardening activities and poultry projects; repairs to physical structures; review of disaster plans; and provision of a number of tertiary scholarships. The delivery of Poor Relief services continued to be challenged by the lack of proper perimeter fencing of properties, high cost for food and utilities, need for improvements to physical structures, and lack of recreation therapy services. Staffing and funding for pertinent programmes remained a priority issue.

Social Security

The **National Insurance Scheme (NIS)**, a contributory minimum guaranteed pension scheme, continued to offer social security benefits and pensions to a range of beneficiaries. For the review year, some 102 953 persons received pension benefits from the NIS, an increase of 5.4 per cent relative to the previous year. The increase was influenced mainly by a

TABLE 25.10
NATIONAL INSURANCE FUND
INCOME AND EXPENDITURE 2014 AND 2013
(unaudited statements) J\$MILLION

INCOME	2014	2013
Contribution (less NHF)	12 965.7	11 483.3
Investment Income	7 249.7	(222.2)
Total	20 215.4	11 263.1
EXPENDITURE		
NIS Benefits Paid	15 136.0	14 735.9
Administrative Expenses	1 173.2	1 041.9
Total	16 309.2	15 777.8
NET INCOME	3 906.2	(4 514.7)

Source: Ministry of Labour and Social Security

proportionately large increase in the category Orphans and Special Child, moving from 26 to 63 persons, and a 5.6 per cent increase in Old Age pensioners. Some 55.5 per cent of Old Age pensioners were females. There was also a 3.8 per cent increase in the number of Widows and Widowers being paid a pension. The data also indicated a 26.0 per cent decrease in the number of Invalidity pensioners who received benefits this year. There was also a 12.2 per cent increase in the number of disablement and employment injury beneficiaries who received pensions from the Scheme (Table 25.9).

At the end of December, the total Net Assets of the **National Insurance Fund (NIF)** stood at \$70.4 billion, recording an increase vis-à-vis the previous year of some \$4.88 billion (1.1 per cent). Among the assets, the Fixed Income portfolio stood at \$49.62 billion, Equity portfolio at \$9.5 billion, and Real Estate at \$10.12 billion. Table 25.10 provides the income and expenditure data (unaudited) for the past two years, indicating that income to the Fund grew by some 79.4 per cent to \$20.2 billion, while expenditure grew by 3.4 per cent to \$16.3 billion, over the period. Net Profit to the NIF was estimated at some \$3.9 billion, an increase from the negative result the previous year. The schedule of investments for the year was dominated by GOJ Fixed Rate Accreting Notes to the tune of \$25.0 million, an increase by 1.2 per cent. This was followed in size by Foreign Currency bonds at \$11.8 million, then Investment Properties at \$10.1 million.

CULTURE

As part of ongoing efforts to strengthen the cultural and creative industries in Jamaica and to influence the country's position in culture and heritage globally, the Ministry of Youth and Culture (MYC) extended its mandate and established a Culture and Creative Industries Policy (CCIP) Division in June. The Division's mandate is to undertake specific deliverables, which include: addressing the paucity of quantitative and qualitative data on the culture sub-sectors; building a database of creative and cultural industries practitioners islandwide; creating legislation and addressing regulation and taxation issues; as well as to play a pivotal role in propelling the cultural, creative and heritage industries. In line with this new mandate, the National Cultural and Creative Industries Commission (NCCIC) was established by the Office of the Prime Minister. The NCCIC seeks to establish an integrated policy framework for the creative economy through the formulation and implementation of a National Cultural and Creative Industries Policy, and a Master Plan for Sustainable Development of Creative and Cultural Industries.

During the year, the CCIP commenced the process of revising the 2003 National Cultural Policy in order to ensure the articulation of a vision that seeks to preserve, safeguard, and develop Jamaica's unique culture, while providing an overarching framework for the maintenance and expansion of the nation's cultural and creative industries, cultural exchanges, and other related programmes. The areas of

priority for the Policy included: establishing functional approaches to cultural development towards a sustainable national economy; cultural and creative industries; and recognition of Jamaica's heritage at the global level.

During FY 2013/2014, Jamaica lobbied for and won candidacy for membership to the World Heritage Committee in November 2013. This was a historic achievement for Jamaica and the country will serve a four-year term on the committee, which will end in 2017. Twelve other State Party countries complete the 21 member committee that meets annually to review the state of conservation of World Heritage sites and inscribe new ones to the World Heritage list. Jamaica participated in its first World Heritage Committee meeting in Doha, Qatar in June 2014. Additionally, the ministry spearheaded technical meetings with experts in natural and cultural heritage in preparation for Jamaica's review of its nomination dossier for the Blue and John Crow Mountains as a possible World Heritage site. The representatives were from the International Council on Monuments and Sites (ICOMOS) and the International Union for Conservation of Nature (IUCN).

The MYC facilitated the tabling of the first report of the National Reparations Committee (NRC) in August, following the establishment of NRCs in eight CARICOM countries (Antigua and Barbuda, Barbados, Belize, Guyana, Jamaica, Saint Lucia, St. Vincent and the Grenadines, and Suriname) in January. The NRC promotes research, consultation and public education on the matter of reparation. A CARICOM Commission on Reparation was also constituted in September 2013 and a Regional Strategic and Operational Plan drafted in February 2014.

The CCIP Division, as part of its ongoing efforts to share with Jamaicans, particularly children and youth, the unique value and influence of the country's culture and heritage, launched a Culture Card programme in December 2013. This programme allows children access, free of cost or at a discounted rate, to cultural activities, cultural centres and heritage sites. During the year, the pilot phase of the programme targeted over 100 students from four high schools, namely: Haile Selassie, Papine, St. Andrew Technical and Vauxhall High schools.

Jamaica's culture portfolio is also managed by a number of cultural agencies including the Institute of Jamaica (IOJ); the Jamaica National Heritage Trust (JNHT); Jamaica Cultural Development Commission (JCDC); the National Library of Jamaica (NLJ); Creative Production and Training Centre (CPTC) and the Jamaica National Commission for UNESCO.

Institute of Jamaica (IOJ)

A number of programmes towards safeguarding cultural heritage were undertaken by the IOJ through its agencies: Jamaica Music Museum; African Caribbean Institute of Jamaica (ACIJ); Natural History Division; the National Gallery; and Liberty Hall. The Jamaica Music Museum hosted a symposium on music and the creative industries in

March, approximately 400 persons were in attendance. The symposium brought together practitioners and leaders in the area of music, business, finance, government and international trade to discuss and exchange ideas towards maximizing the potential of the Jamaican Cultural Industries. The event sought to develop a set of concrete recommendations that will be used as a strategic framework for the restructuring of Jamaica's Cultural Industries as a catalyst in the recovery of the economy. The Musgrave Awards Ceremony is hosted by the IOJ in October annually, as part of activities to mark Heritage Month. A total of nine Jamaicans were honoured for outstanding achievements in science, literature, art, and music. The Institute through its museums, the National Gallery of Jamaica, the Natural History Museum, National Museum Jamaica and Jamaica Music Museum acquired a total of 673 artefacts which will significantly boost the existing collections within each museum.

The ACIJ embarked on an initiative to collect and document various aspects of Jamaica's intangible cultural heritage islandwide, as part of efforts to protect and preserve the nation's rich legacy. This community-based programme was launched in October and involved the ongoing development of an electronic portal to store oral expressions, social practices, and rituals. A national call was made to encourage the documentation and submission of videos, recordings, interviews or drawings of traditional Jamaican practices to the ACIJ for preservation. Other notable initiatives of the IOJ included housing the National Gallery of Jamaica's (NGJ) exhibition series; and the opening of the refurbished Montego Bay Cultural Centre, formerly known as the Montego Bay Civic Centre, which will among other functions, house a permanent national art gallery, a museum, and an artisan village.

Jamaica Cultural Development Commission

The Jamaica Cultural Development Commission (JCDC) continued to play a pivotal role in developing and strengthening the Jamaican cultural landscape. This was demonstrated through its national cultural programmes that unearthed, developed and showcased creative local talents and expression, thereby contributing significantly to the enhancement of Jamaica's creative economy. This affirmed the Commission's continued commitment to its vision and mandate to foster cultural growth and prosperity. The JCDC embarked on a restructuring exercise in an effort to further streamline the operations of the Commission as well as to serve as an incubator to develop the nation's talent for exposure to the world. The focus was on developing a business model of its operations to commence the process of establishing an Artist Management Division, and to transform the Ranny Williams Entertainment Centre into a modern performance venue.

Independence celebrations focused on the 180th anniversary of the Abolition of Slavery; the 70th anniversary of the New Constitution to end the Crown Colony status of

Jamaica, which, among other things introduced Universal Adult Suffrage; and the 100th anniversary of the Universal Negro Improvement Association (UNIA) - African Communities League, conceptualized by the Right Excellent Marcus Mosiah Garvey. The Grand Gala was a major feature of Independence, held under the theme, "Land of my Birth". Other key programmes for the period included:

- **Performing Arts** – Many Jamaicans benefited from training, exposure and recognition, which enabled participants to make worthwhile contributions to the creative and cultural industries, and building of Brand Jamaica. Areas covered in this programme are: Dance (including Deaf Dance), Drama, Traditional Folk Form, Music and Speech. There was a total of 8 387 entries across all areas.
- **The Miss Jamaica Festival Queen competition** – The competition continued to encourage the development of cultural awareness, talent and creativity in some of Jamaica's most beautiful women. A total of 116 entries were submitted for participation in the competition. The theme for the competition was "Jamaican Women...Shaping our Culture and our Nation".
- **The Jamaica Festival Song competition** – A new format was introduced this year, whereby music producers were invited to submit entry songs. This competition attracted some 39 entries. The competition continued to provide a showground for aspiring artistes and songwriters to showcase their talents.
- **Jamaica Creative Writing competition and Exhibition** – Annually, writers of all ages are invited to submit works in a number of categories which include: novels, essays, plays, poetry and short stories. Exceptional writers compete for the titles "Special Writer", "Outstanding Writer" and the most prestigious title of "Best Overall Writer". Through this venture, the Gold Anthology, a compilation of gold medal-winning pieces of Jamaican cultural literature was produced in 2013. The aim is to make the award-winning original work available to the public as a periodic publication. An "e-book" version for the Diaspora was launched in November. During the period, 554 entries were collected by the Commission, an increase of 115 compared with the previous year.
- **Culinary Arts** – Over 600 entries were received for the Festival of Foods competition. The competition celebrates the culinary creativity of Jamaicans, while allowing participants to showcase and sharpen their culinary skills for personal and commercial pursuits. Special emphasis is placed on the use of locally grown agricultural items to foster a sense of appreciation of the local agricultural products.

Other talents were exhibited through the Jamaica Gospel Song Competitions; the Big Stage Competition (formerly the “Pop and Variety Contest”); and the World Reggae Dance Championship.

In a continued effort to highlight the significance of national icons, floral tributes and civic ceremonies were held to commemorate the birth anniversaries of The Right Excellencies Alexander Bustamante, Norman Manley and Marcus Mosiah Garvey. Other commemorative events that were held included: The National Workers’ Week and Labour Day Thanksgiving Service; National Independence Thanksgiving Church Service; and the Miss Lou Celebration. Some new events were also staged to commemorate the Jamaica Festival period under the theme “This is Jamaica... My Jamaica”, namely: the Celebration of Drums, Dutchie Food Festival; Heart of Ska; and the Auntie Roachie Film, TV and Literary Festival.

Additionally, the Commission in collaboration with the National Youth Service implemented a six-month event management project that recruited and trained 50 youth as Event Production Assistants islandwide. A one-week residential workshop was held, after which, the individuals were placed at the JCDC parish offices for a six-month internship. Finally, an MOU was also signed with the National Library to convert audio-visual content from old formats to DVD.

Jamaica National Heritage Trust (JNHT)

Jamaica’s tangible cultural heritage programme was further strengthened in 2014, with 10 sites being declared protected monuments by the JNHT. Among the sites declared were three maroon communities—Scots Hall, Hayfield and Charles Town. The agency also undertook archaeological research at 15 historical sites. Additionally, the Trust continued its public campaign to educate Jamaicans about the value of the country’s tangible heritage. A number of exhibitions and presentations were also undertaken in schools islandwide.

National Library of Jamaica (NLJ)

The National Library of Jamaica (NLJ) is the agency that assigns International Standard Book Numbers (ISBN) and International Standard Serial Numbers (ISSN) to local publications. Over the period, the National Library of Jamaica assigned 371 ISBNs and 32 ISSN. The materials deposited to the NLJ were as follows: Books (294), Electronic Documents (14), Serials (48), CDs (317) and DVDs (20).

The NLJ launched a library management system, “Worldcat”, in October, which placed a record of the library’s holdings into a global library catalogue which is available

online. To further enhance this initiative, the NLJ launched its Digital Collection, a digitized encyclopedia of local content to include the library’s paper and photograph collections, as well as full text of eighteenth and nineteenth-century Jamaican books.

Another key initiative of the NLJ was the launch of the revised Poet Laureate programme in Jamaica. On May 21, the Honourable Professor Emeritus Mervyn Morris, OM, was invested with the Poet Laureate of Jamaica Insignia. Professor Morris¹⁶ is the first nationally recognized Poet Laureate of Jamaica. A Poet Laureate is selected from a country’s most esteemed and accomplished poets and who subsequently occupies a recognized position in a nation’s literary heritage. Prior to 2014, there have been two Poets Laureate of Jamaica: Tom Redcam and John Ebenezer Clare McFarlane, who were both named by the Poetry League Society of Jamaica, a private entity. The NLJ serves as secretariat to the programme as well as the repository for the publications, recordings and ephemera that will emanate from the Poet Laureate programme of activities.

Creative and Production Training Centre

The Creative and Production Training Centre, in addition to its mandate to record, archive and promote diverse expressions of Jamaica’s indigenous culture, continued to collaborate with MDAs to produce quality cultural content programmes. The entity also continued its training mandate through the Media Technology Institute (MTI), which provided specialist training in various communication and media related disciplines to both media practitioners and other persons with an interest in media or seeking an opportunity for further self-development. A combination of certificate, diploma and modular programmes are offered in a number of disciplines to include: Voice & Speech Training; Radio Announcing & Presentation; Techniques of Video Production; Principles of Non-Linear Editing; Basic Digital Design; and Digital Graphics and Animation.

Culture, Health, Arts, Sports and Education (CHASE) Fund

Over the period April 1 to December 31, 2014, some 84 projects totalling \$185.6 million in grants were approved (see Table 25.11). The categories, Performing Arts, and Historic Sites and Monuments accounted for 67.3 per cent of funding approved to cultural projects in the current period, valued at approximately \$124.9 million. There was, however, no allocation approved for funding to support local museums relative to approximately \$44.4 million which was allocated in the previous period.

16. Professor Morris is the first Poet Laureate to be named by the Government of Jamaica.

TABLE 25.11
CHASE FUND APPROVED GRANTS FOR CULTURAL ACTIVITIES, 2013 AND 2014

Category	February 2013 – January 2014		April 2014 – December 2014	
	No. of Projects	Amount Approved \$	No. of Projects	Amount Approved \$
Performing Arts	28	70 381 072	30	61 001 591
Literary works	13	13 202 774	6	7 996 509
Libraries and Archives	3	17 131 450	1	1 481 307
Visual Arts	4	5 890 000	6	6 142 000
Museums	2	44 385 368		0
Heritage and Craft	12	8 542 200	19	31 300 760
Music, Film and Media	17	20 899 374	16	13 756 340
Historic Sites and Monuments	5	14 266 628	4	63 923 526
Total	84	194 698 866	84	185 602 033

Source: CHASE Fund

OUTLOOK

The Office of the Children's Advocate (OCA) will continue to build its capacity for data analysis and research, including leveraging information and communications technology to improve efficiency and the quality of internal and external service delivery. The Office of the Children's Registry (OCR) currently operates from four parishes: Kingston (head office), St. Ann, Westmoreland and Manchester. In keeping with its mandate to operate at least one office in each parish, plans are under way to commence operation from St. Mary in the first quarter of the 2015/16 fiscal year. The OCR, in collaboration with the CDA will seek to complete the Case Management System within a year after the approval has been granted to the developer. In an effort to strengthen the OCR's ability to monitor the status of cases relating to children the Registry will establish protocols to receive updates on children brought before the court from the Judicial System in accordance with the Children's Registry Regulations. Efforts towards effectively coordinating the child alert and recovery process will continue.

Construction is expected to commence in 2015 for the establishment of a modern, state-of-the-art facility for addressing mental health issues in children and adolescents, at the Bustamante Hospital for Children. Construction is expected to begin also in 2015 for the establishment of an

adolescent psychiatric in-patient unit at the University Hospital of the West Indies (UHWI).

The revision of the National Youth Policy is expected to conclude in early 2015 with submissions to Cabinet and final rounds of consultations. Through a five-year plan, the YMCA plans to redevelop Camp Hamilton at Caymanas Bay into a residential camp site and training centre. There are also plans to increase the number of classroom facilities and improve the general physical environment while establishing sustainable funding projects in an attempt to make the YMCA a financially viable institution. Plans are also in place to incorporate parents of students of the YMCA by offering new activities targeting parents and establishing a parent place.

It is anticipated that gender mainstreaming will progress with the continued legislative review and reform in line with the National Policy for Gender Equality (NPGE) and that there will be Cabinet approval and subsequent implementation of the draft National Strategic Action Plan to Eliminate Gender-based Violence (2015–2025). Additionally the Bureau of Women's Affairs (BWA) will look critically at the employment of best practices from other countries to build on gains achieved, particularly in areas covered by the Beijing Platform for Action (BPFA), and in keeping with Jamaica's commitment to the principles outlined in the NPGE and the Gender Sector Plan of the Vision 2030 Jamaica – National Development Plan. ■

INDICES & APPENDICES



National Innovator of the Year, Harlo Mayne and team receiving the National Innovation Award trophy from Minister of Science, Technology, Energy and Mining (MSTEM), Hon. Phillip Paulwell (l) at the National Innovation Awards Ceremony 2014. The event was organised by MSTEM, the National Commission on Science and Technology (NCST) and the Scientific Research Council (SRC).

Photograph contributed by SRC

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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 Policies

Policies aimed at restricting the level of monetary demand, so that the pressure of demand for imports of goods and services is contained and the domestic demand for goods and services does not divert these from export markets.

Demographic Transition

The change from high to low birth and death rates that generally characterizes a population as it moves from a predominantly agricultural to an industrial society.

Demography

The scientific study of the size and structure of populations and its components, causes, consequences and changes of these. Population structure involves the composition and spatial spread of people. Fertility, mortality, migration and social mobility are different processes which separately or in combination produce population change.

Dependency ratio

The ratio of the economically dependent section of the population to the productive section; arbitrarily defined as the ratio of the young (those under 15 years of age) plus the elderly (those 65 years and over) to the population in the working ages (those 15 to 64 years of age).

Disintermediation

Switching funds by depositors from one type of account to another within the same bank to take advantage of interest rate differentials.

Dumping

The practice of selling in foreign markets at lower prices than in domestic markets.

Early Childhood Development

Early childhood development addresses the cognitive and emotional development of children, 0 to 8 years. It requires the holistic development of the child in an environment that is ideally nurturing, caring and safe – to survive, be physically healthy, mentally alert, emotionally secure, socially competent and able to learn.

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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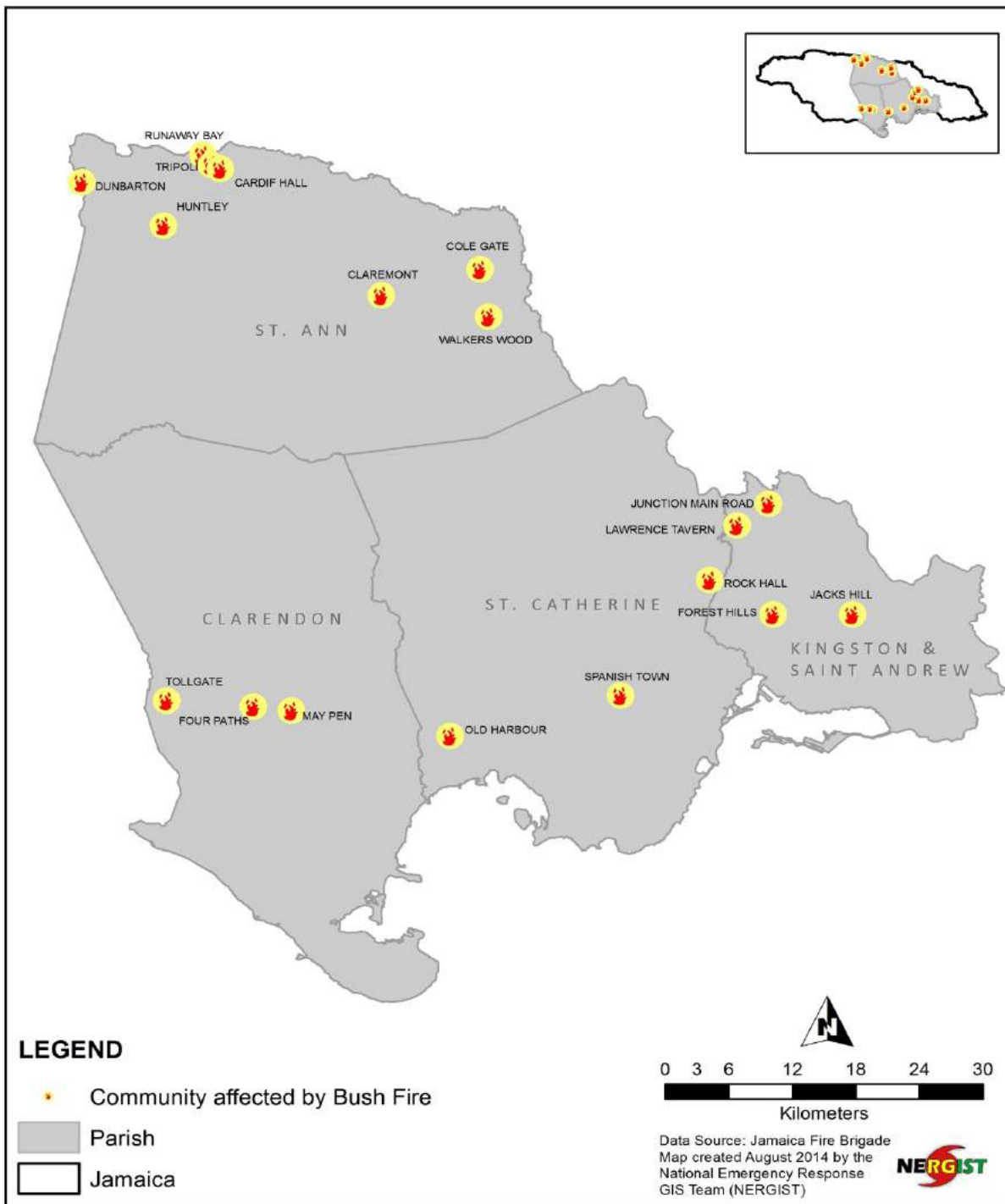
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APPENDIX 3A: COMMUNITIES WITHIN PARISHES THAT HAVE BEEN MOST AFFECTED BY BUSH FIRES - JANUARY TO MARCH 2014

Communities within Parishes that have been most affected by Bush Fires - January to March 2014



APPENDIX 23A: Parish Epidemic Curves: Number of Confirmed and Suspected cases of Chikungunya Virus by Epidemiological Week for each Parish in Jamaica, 2014

