



Government of Jamaica

VOLUNTARY NATIONAL REVIEW ON THE 2030 AGENDA AND THE SUSTAINABLE DEVELOPMENT GOALS

SPECIAL REPORT: IMPACT OF THE COVID-19 PANDEMIC
ON EDUCATION, LABOUR MARKET, TOURISM
AND SOCIAL PROTECTION



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EXECUTIVE SUMMARY

This special report surveys the impact of the COVID-19 pandemic on Education, the Labour Market, Tourism and Social Protection. It also outlines the responses of the Government of Jamaica (GOJ) and its stakeholders to the pandemic. Additionally, it identifies the imperatives for recovery, in the context of advancing the full implementation of the sustainable development goals. The report was compiled with data from a comprehensive desk review that included several recently completed reports and interviews with key stakeholders and sector specialists.

MAJOR FINDINGS AND CONCLUSIONS

Education

School closure, prompted by the pandemic, affected students' access to education. Though the government introduced online learning, many students (and their teachers) faced limitations such as lack of access to the Internet and electronic devices. Concerning children's mental health, some reported difficulty in focusing on schoolwork in the absence of a learning-conducive environment at home. It is estimated that the learning loss for Jamaican school-aged children is 1.2 years. Students with disabilities who already encountered challenges before the pandemic (e.g., shortage of trained special education teachers), were particularly affected because the online setting was less conducive to their learning needs. This included students who are deaf or have a visual impairment or children with autism spectrum disorder (Parker and Alfaro 2021).

Higher education was not spared; many students had challenges, such as lack of financial resources; lack of a dedicated space to focus, organize and study and feelings of disengagement, depression, discouragement and dysconnectivity.

HIGHER EDUCATION WAS NOT SPARED; MANY STUDENTS HAD CHALLENGES, SUCH AS LACK OF FINANCIAL RESOURCES; LACK OF A DEDICATED SPACE TO FOCUS, ORGANIZE AND STUDY AND FEELINGS OF DISENGAGEMENT, DEPRESSION, DISCOURAGEMENT AND DYSCONNECTIVITY.

The GOJ's response to the disruption in learning varied. It covered:

- academic support, for example, Bridging the Gap – Child Find”, to find and re-engage approximately 120 000 students who could not be accounted for during remote learning
- teacher training and support such as the Online and Blended Professional Development Initiative to build educators' skills in using blended and online strategies
- parental support for example helplines established to provide psycho-social care and send out tips and the provision of equipment and resources such as distribution of resource kits to students and the Own Your Own Device” programme that granted more than 24 000 vouchers valued at \$20 000 each.

Some tertiary institutions introduced measures to address the challenges that their students faced, including an extension of the deadline for the payment of tuition fees and an extension of the 2020 Spring Semester into the summer months to compensate for lost time.

Labour Market

The pandemic reversed positive trends in the labour market, such as increases in the average employed labour force, a reduction in the unemployment rate and improved labour market efficiency. The contraction of the economy between January and December 2020 led to loss of income for many Jamaicans. Workers in the Accommodation and Food Services and Transportation and Storage sectors were especially affected. Youth and women were particularly impacted by job losses – a 9.0 per cent average decrease and 9.8 per cent average decrease respectively. Some 57.4 per cent of households experienced a decrease in income between March and July 2020, according to data from STATIN.

The GOJ implemented several initiatives to cushion the effect of the pandemic on the labour market. Key among them were the income-replacement programmes such as the \$10-billion COVID-19 Allocation of Resources for Employees (CARE) Programme that supported vulnerable workers, especially in sectors most adversely

affected by closures and reduced business – tourism, restaurants, and transportation as well as small business operators. Other interventions included using the Labour Market Information System to support the redeployment of displaced workers and the processing of redundancy payments under the Employment (Termination and Redundancy Payments) Act.

The private and public sectors view the COVID 19 response measures as a qualified success, notwithstanding that there are still challenges which are largely structural. Concerning the use of technology, the MLSS noted that it was satisfied with the results of efforts to promote online services. The use of online services by PATH beneficiaries increased from 14.0 per cent to 43.0 per cent. The use of technology created new sources of efficiency in the public and private sectors – a key lesson that can be applied going forward.

THE PANDEMIC REVERSED POSITIVE TRENDS IN THE LABOUR MARKET, SUCH AS INCREASES IN THE AVERAGE EMPLOYED LABOUR FORCE, A REDUCTION IN THE UNEMPLOYMENT RATE AND IMPROVED LABOUR MARKET EFFICIENCY. THE CONTRACTION OF THE ECONOMY BETWEEN JANUARY AND DECEMBER 2020 LED TO LOSS OF INCOME FOR MANY JAMAICANS.

Tourism

Tourism – directly or indirectly affects many areas of social and economic life. The performance of the tourism sector has implications for Jamaica's performance in other SDGs: Goal 8 – Decent Work and Economic Growth; Goal 12 – Responsible Consumption and Production, Goal 14 – Life below Water and Goal 1 – End Poverty.

The COVID-19 pandemic had a dramatic impact on the sector. Targets for key outcome indicators – foreign exchange earnings, visitor arrivals and employment were significantly disrupted. Restrictions in global travel and border closures caused visitor arrivals to plummet by almost 70.0 per cent. Job losses followed. By April 2020, about 90.0 per cent of persons employed in the tourist accommodations sector were sent home. Workers in the informal sector, including ground transportation and craft vendors, were particularly affected by job losses. The fall-off in stopover and cruise visitors also affected foreign total exchange earnings, declining by 65.5 percent (from US\$3.6 billion in 2019 to US\$ 1.3 billion in 2020). The pandemic also hit the govern-

THE COVID-19 PANDEMIC HAD A DRAMATIC IMPACT ON THE SECTOR. TARGETS FOR KEY OUTCOME INDICATORS – FOREIGN EXCHANGE EARNINGS, VISITOR ARRIVALS AND EMPLOYMENT WERE SIGNIFICANTLY DISRUPTED. RESTRICTIONS IN GLOBAL TRAVEL AND BORDER CLOSURES CAUSED VISITOR ARRIVALS TO PLUMMET BY ALMOST 70.0 PER CENT. JOB LOSSES FOLLOWED.

ment's coffers, with more than \$46 billion in revenue lost because of the decline in tourism activity; indirect revenue losses based on tourism linkages with other sectors, for example, Special Consumption Tax fell by 22.3 per cent, partially due to a decline in alcohol production for hotel and entertainment activities.

Response measures implemented by the MOT covered four key areas: provide job and income protection and training for tourism workers, support the survival of tourism businesses, facilitate the tourism sector's short-term recovery and promote the tourism sector's medium-term sustainability and resilience. There are signs of recovery – employment has already increased – evidence that the sector has been fairly resilient and responsive to the various initiatives that were implemented to cushion the pandemic's impact.

Social Protection

The vulnerabilities and risks that Jamaicans faced because of the COVID-19 restrictions and the subsequent economic fallout, required a social protection response. The challenges for many Jamaicans included unmet basic needs such as food and medical support); loss of livelihood and gender-related dynamics impacting household welfare. Additionally, the pandemic disrupted service delivery for social protection programmes including ability of staff to do requisite site visits and inspections and curfew hours limiting volunteers' support to persons who are homeless.

Public-private partnerships were instrumental in driving the social protection response to the pandemic. The response measures covered the main social protection priorities: access to social assistance (welfare support), food security, income support,

THE CHALLENGES FOR MANY JAMAICANS INCLUDED UNMET BASIC NEEDS SUCH AS FOOD AND MEDICAL SUPPORT); LOSS OF LIVELIHOOD AND GENDER-RELATED DYNAMICS IMPACTING HOUSEHOLD WELFARE.

access to basic social services, governance and safeguarding inclusion, rights and equity. Key initiatives included the COVID-19 Allocation of Resources for Employees (CARE) Programme, regarded as the largest social support programme for the vulnerable in Jamaica's history and the allocation of approximately \$8.5 billion (in the Fiscal Year 2020/21) to PATH, to aid the registered elderly, persons with disabilities, children living in poor households, the adult poor and pregnant and lactating women.

THE WAY FORWARD

Education

The pandemic disrupted Jamaica's efforts to advance SDG 4 and highlighted the inequalities and inadequacies in the education system that should be addressed to "build back better". There is an opportunity to apply key lessons learned in responding to the pandemic in recovery including the use of technology in teaching, the development of more interactive methods of teaching and the role of parents and the community in supporting learning.

Learning losses, especially among the vulnerable; inequity in resources; children's mental health, and the disengagement of boys especially in higher education, remain significant challenges, which must be prioritized in recovery.

Key recovery strategies include applying digital resources to expand access to quality education; targeting for academic support those most at risk of being left behind, and greater commitment from parents and other stakeholders to play a more significant role education of the nation's children.

Labour Market

The pandemic and the response measures have affected Jamaica's economic growth programme and the advancement of its national development priorities. There are major challenges ahead; many require structural and long-term strategies if Jamaica is to reverse the impact of the pandemic, restore the country to a path of sustainable growth and "build back better".

The Jamaican economy registered economic growth in the first quarter of the new fiscal year. The macro-economic fundamentals have improved; positive economic growth is expected to facilitate the recovery efforts in FY 2021/22.

The COVID-19 Labour Market Taskforce (established in late 2020) is pursuing recovery strategies in four key areas: i) emergency management and infrastructure, ii) economic recovery, iii) social safety nets and iv) strengthening labour market institutions. Concerning economic recovery, response measures such as income replacements, and unemployment benefits, should be institutionalized as priority. The social

protection response was critical for individuals and households (see the section on Social Protection) during the pandemic. Strengthening the social protection systems will better prepare Jamaica for future shocks; therefore, social safety nets should be expanded. There is an opportunity to strengthen the National Insurance Scheme. The unemployment insurance feasibility study, which is ongoing, will be an important step to understand how to bolster social safety net provisions.

Tourism

Given the significance of the sector to the economy, the recovery of land-based and cruise tourism, if sustainably managed, would contribute significantly to Jamaica's economic recovery. The sector has started to recover and is expected to grow, though visitor arrivals, are not anticipated to return to pre-pandemic levels before 2023.

The pandemic highlighted key structural issues in the sector that should be addressed to bolster the sector's resilience to future shocks. Key among them is the sector's dependence on a small group of overseas source markets, indicating the need to diversify.

Rebuilding the tourism sector to pre-pandemic performance levels and continuing the growth of the sector along its prior path in a sustainable manner will require additional and innovative strategies. The Tourism Sector COVID-19 Recovery Plan proposes action in four areas: i) Destination Assurance Strategy and Framework, ii) resilience planning, iii) inclusiveness and sustainability and iv) partnerships. Other strategies for recovery include supporting business survival (particularly MSMEs) along the tourism value chain; job and income protection, and training of workers, and leveraging opportunities for regional cooperation.

Social Protection

The social protection system was central to the timely response of the government and its partners to the challenges that Jamaicans, especially the vulnerable and their families, faced during the pandemic. The pandemic has reshaped the national landscape and dialogue about the socio-economic wellbeing of Jamaicans, providing the opportunity to further expand *effective social protection* to support recovery.

Several priorities and imperatives highlighted in the Social Protection Strategy and aligned frameworks are now at the forefront, Including national identification, national registration, payment modalities, digitalization of processes, and must be advanced to strengthen the social protection system in the event of future shocks. Additionally, other challenges highlighted by the pandemic should also be addressed, such as access to the Internet, access to basic services and child protection. In moving forward, there is also opportunity to leverage the expansion of the public-private partnerships for social protection that supported the pandemic response.

INTRODUCTION

In March 2020 Jamaica identified the first case of the coronavirus disease. The pandemic subsequently spread across the country, prompting the activation of measures under the Disaster Risk Management Act. These measures restricted movement during specified periods with the implementation of daily curfews and prompted closures in key sectors such as education, tourism and entertainment. Consistent monitoring of the pandemic by the Ministry of Health and Wellness (MOHW), and promotion of measures to limit the rate of infection, complimented the containment measures.

The pandemic adversely affected key sectors and resulted in losses of jobs and revenue. The education sector was particularly affected, with low participation in remote learning because of limited or no access to resources including devices and internet service. The pandemic also affected vulnerable groups such as persons with disabilities, women and children.

Additionally, the pandemic highlighted weaknesses in key sectors and presented opportunities for strengthening critical areas such as using digitalization to expand service delivery in the public sector and the adoption of new approaches to work that promote greater productivity.

The GOJ implemented swift measures to safeguard the gains previously made on key economic indicators. Social Protection was the primary response, comprising largely of cash transfers to vulnerable populations and, cash transfers and soft loans to the business sector to mitigate losses due to the emergency protocols, and to enable the digitalization of business services. In addition, measures were implemented to consistently engage children in the learning process including broadcasting lessons through traditional and new media. The health measures implemented by the GOJ sought to increase awareness of the disease and address its impacts. Consistent information sharing with the public through various media, as well as treatment and prevention measures, were implemented by the MOHW and partners. The vaccination programme was prioritized for implementation once available and continues to be implemented as a key measure to contain the spread of the virus.

The GOJ continues to address the impacts of the pandemic whilst prioritizing growth and development. The country continues to be committed to implementing the 2030 Agenda and the Sustainable Development Goals. The Voluntary National Review (VNR), for 2022, assesses the impact of the Covid 19 pandemic broadly, as a

THE GOJ IMPLEMENTED SWIFT MEASURES TO SAFEGUARD THE GAINS PREVIOUSLY MADE ON KEY ECONOMIC INDICATORS. SOCIAL PROTECTION WAS THE PRIMARY RESPONSE, COMPRISING LARGELY OF CASH TRANSFERS TO VULNERABLE POPULATIONS AND, CASH TRANSFERS AND SOFT LOANS TO THE BUSINESS SECTOR TO MITIGATE LOSSES DUE TO THE EMERGENCY PROTOCOLS, AND TO ENABLE THE DIGITALIZATION OF BUSINESS SERVICES.

cross-cutting issue in discussing the achievement and challenges for each goal and sector. Recognizing the impact on key goals, the review process brings focus to the main issues within the sectors most affected by the pandemic. The thematic reports on Tourism, Education, Social Protection and the Labour Market, examine more deeply the impact of the pandemic within these sectors, and thorough research, including consultation with key sector specialists, identify the imperatives for recovery, in the context of advancing the full implementation of the sustainable development goals.



EDUCATION

This report describes the impact of the COVID-19 pandemic on Jamaica's education sector, focusing on how the country was able to maintain the gains it has made towards the achievement of Goal 4, which is to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. It also outlines the responses of the Government of Jamaica (GOJ) to address or bridge the gaps the sector faced as well as the way forward towards the achievement of “World Class Education and Training”. The assessment was compiled with data from a comprehensive desk review that included several recently published reports, along with interviews with key stakeholders in the sector. There was however a limitation in the availability of quantitative data.

CONTEXT

According to UNESCO, inclusive education is: “a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion from education and from within education.” The Government of Jamaica (GOJ) has increasingly focused on inclusion and equity in the education system spending approximately 5.0 per cent of GDP and up to 19.0 per cent of total government expenditure (UNICEF 2020). Investments in the education sector have not always yielded the targeted learning outcomes, as challenges remain in achieving learning standards, especially in numeracy (Patterson 2021). This is particularly evident among the vulnerable where availability of resources and opportunities need to be expanded.

As a result of the pandemic, children are exposed to various risks impacting school attendance, performance, and health outcomes, both physical and emotional. The resulting learning loss is anticipated to have consequences for students and by extension the nation. The challenge for the GOJ will be prioritizing the issues that can catalyze results including academic interventions, social protection, and health services for children.

IMPACTS

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.

Closure of schools

On March 13, 2020, upon confirmation of the first case of COVID-19 on the island, the Ministry of Education, Youth, and Information (MoEYI) ordered all public and private schools closed. Schools remained closed for most of 2020 and intermittently in 2021. This closure had an impact on a little over 530 000 students from the Pre-primary to the Tertiary level (PIOJ 2020a). As a result, the government introduced online learning.

The transition to online learning posed a challenge for inclusivity, as students with limited or no access to online platforms, smart devices, or television through which scheduled educational programmes were delivered, were not engaged. Private schools which had a greater level of resources were better equipped to respond quickly to the change in modality; many of them were ready for remote learning after a few weeks, while many public schools were delayed for up to several months (British Educational Research Association 2021)

ACCESS TO EDUCATION

Remote learning modalities

STUDENTS FROM THE HIGHEST QUINTILE WERE **5.5 TIMES**
MORE LIKELY TO HAVE ACCESS TO A TABLET OR COMPUTER
THAN WERE THEIR COUNTERPARTS FROM THE POOREST QUINTILE.
REDUCTION IN THE UNEMPLOYMENT RATE

ABOUT **1 IN 4 STUDENTS** AT THE PUBLIC, PRIMARY AND SECONDARY
SCHOOL LEVEL HAD BEEN DISENGAGED FROM LEARNING AT THE ONSET
OF THE PANDEMIC.



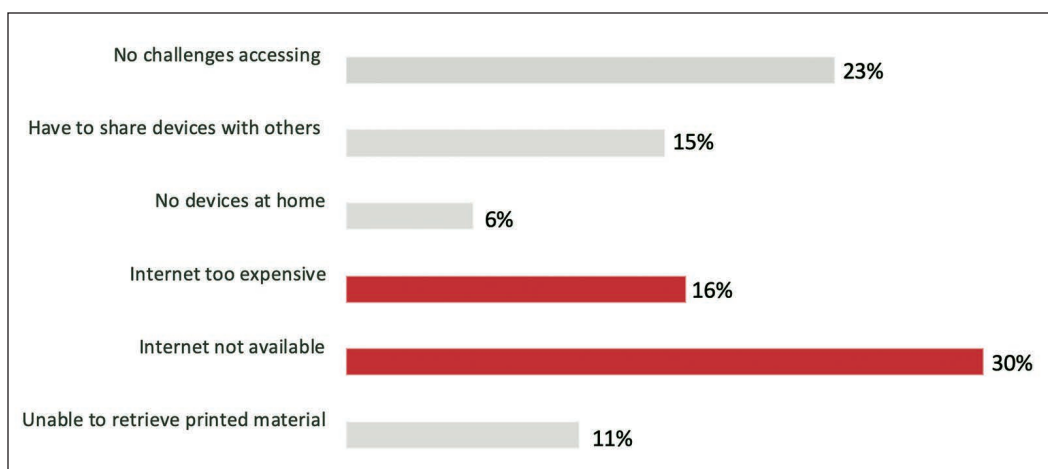


Figure 1: *Challenges in Accessing Learning*

Source: UNICEF 2021

When socio-economic status was considered, students from the highest quintile were 5.5 times more likely to have access to a tablet or computer than were their counterparts from the poorest quintile (Blackman 2022). Access to the Internet (connectivity and costs) were identified as challenges that students faced when accessing learning during the pandemic (UNICEF 2021). See Figure 1.

The MoEYI reported that approximately 120 000 Jamaican children had been disengaged from learning since the onset of the COVID-19 pandemic in March 2020. Schools had little or no regular contact with these students, who represent almost 25.0 per cent of the enrolment in public primary and secondary schools (MOEY 2022). School closures and the shift to remote learning have been detrimental to not only students' learning but also their mental health, and development. Children over six years old are reportedly spending, on average, more than twice the time in front of a screen since the COVID-19 restrictions began – increasing from 3.1 before the pandemic to 6.8 hours per day (according to a 2020 survey conducted between June and July 2020). Up to 13.0 per cent of households reported that their children's online activity, including the content they view, was seldom or never supervised by an adult (UNICEF 2020).

Two of the main challenges reported by students were difficulty in focusing on schoolwork in the absence of a learning-conducive environment at home, and lack of access to the Internet and electronic devices (CAPRI 2021a). See Figure 2.

Another challenge noted was the quality of the children's parental education, which potentially added to the gap which already existed, as children and adolescents from the poorest households usually have parents with significantly lower levels of education than those from households in the top quintile (UNICEF 2020).

In response, the GOJ and other partners implemented several initiatives aimed at enabling remote learning, to ensure that students could continue their education despite the limitations created by the pandemic. Reports from by MoEYI, March 2022, noted the following responses:

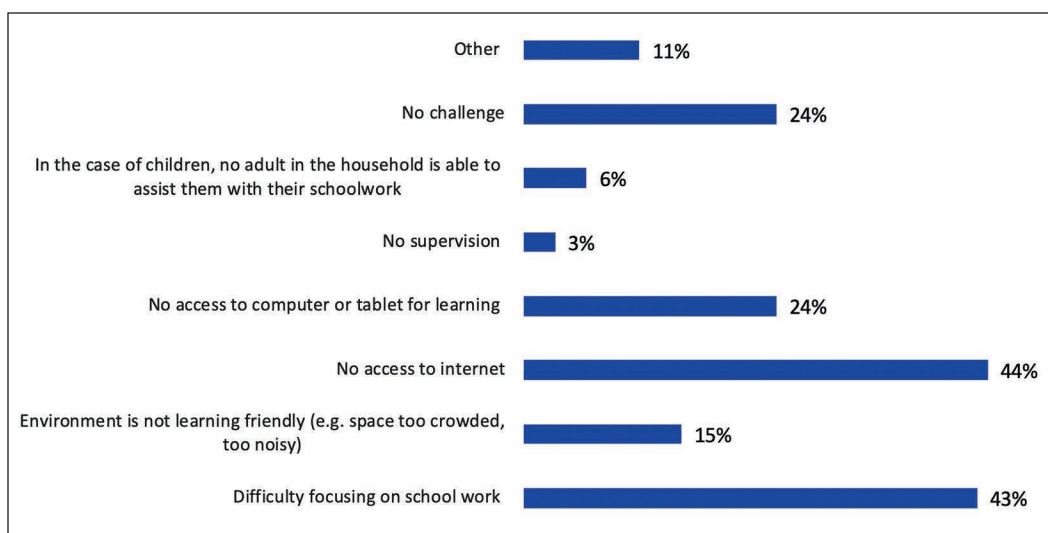


Figure 2: Challenges to School-From-Home during COVID-19

Source: CAPRI “Time Out”: The Impact of COVID-19 on Education 2021.

Equipment and Resources

- For students without Internet, learning materials (print and through traditional media) were provided; news bulletins were sent out with a list of online resources available for Grades 1–9 and a hotline was activated to support Primary level students preparing to sit the Primary Exit Profile (PEP) exam
- In collaboration with this effort, schools provided kits of printed materials that were delivered and collected at pre-established meeting points. In some instances, when packages were not collected, principals and teachers went into remote and distant communities to deliver and collect work
- Resource kits were distributed to students through the regional offices of the MoEYI and radio lessons were produced. The use of work kits and radio lessons were especially common in rural areas where there was no access to internet or cable services
- In the early stages of the pandemic, assistance in the form of computers and tablets was provided to the neediest students, mainly at the primary levels. The GOJ through the MoEYI distributed approximately 18 000 tablets and 12 000 desktop computers. Additionally, the GOJ provided 40 000 tablets and laptops to the poorest students at the upper primary level (grades 4–6)
- More than 24 000 vouchers valued at \$20 000.00 each were granted to parents to assist with the purchase of tablets for their children through the “Own Your Own Device” incentive programme launched in 2021
- Funds were granted to public secondary schools to procure laptops for beneficia-

- ries of the Programme for Advancement through Health and Education (PATH) in Grades 10–13
- Food for the Poor donated a total of 764 computer sets at the start of the pandemic (each set can be used by six students at a time), providing computer access for 4 584 students in schools, homework centres and other underserved neighbourhood sites (Food for the Poor n.d.).

Teacher Training and Support

- The Online and Blended Professional Development Initiative was launched to prepare educators to use blended and online strategies. The initiative was a partnership between the MoEYI and University of the West Indies (UWI) Open Campus
- Educational sessions were offered at all levels – early childhood through tertiary – through several media (online, traditional media, printed material)
- Approximately 22 000 educators were trained in the use of four Learning Management Systems (LMS) as they transitioned from face-to-face teaching and learning to online platforms.

Academic Support

- “Bridging the Gap – Child Find”, a yard-to-yard initiative of the MoEYI was launched in the summer of 2021. It was part of the national school learning and intervention plan to complement the efforts of school-based teams to identify, locate and re-engage approximately 120 000 students who could not be accounted for using any of the three established modalities of remote learning: online/computer-aided, audio-visual, access to learning kits /printed materials. The MoEYI allocated \$103.0 million from the 2022–2023 budget to fund this programme. The latest data from the ministry revealed that as at March 2022 more than 25 000 students mainly from the secondary level were still disengaged
- In 2020, face-to-face sessions resumed for students sitting external regional exams (CSEC, CAPE, NCTVET and City and Guilds for grades 11–13) for one month. Students sat exams from the end of July to mid-August (face-to-face)
- The University of the West Indies (UWI) relaxed their entry requirements for 2021 and 2022.

BOX 1. PARTNERSHIPS: ENHANCING DIGITAL INFRASTRUCTURE FOR REMOTE LEARNING

- The government expanded digital connectivity to five additional hotspots to support emerging needs in the education sector. Private internet providers also got on board by offering zero-rated data service plans, data packages at a reduced cost, and access to frequently used zero-rated websites
- Some of the learning websites were zero-rated by the GOJ to support online learning. This was enabled through collaboration with the leading internet providers on the island
- The MOEYI partnered with private cable providers to facilitate free access to live remote classes and free full syllabus coverage for grades 1–13 from March 23 to July 3, 2020, via a virtual learning platform. Through this medium, 63 subjects were delivered through more than 50 classes per day. There were 44 025 student users (roughly 8 per cent of the grades 1–13 student population of 534 660); 3 233 teachers (approximately 10 per cent of the current teacher population of 32 169); and 821 parents
- A roaming internet service was launched by MOEYI in collaboration with the Jamaica Teaching Council and the Universal Access Fund for rural communities. This entailed the procurement of a router which was placed on a bus that travelled across the education regions and parked in communities based on a pre-determined schedule.

Source: Desk review, key reports.

Parental Support

Parental support during the COVID-19 pandemic was also a key concern of the MoEYI, and through partnerships, the GOJ assisted parents to cope during the pandemic. The following strategies were implemented:

- Across all six education regions, 35 psycho-social helplines were established for parents, to provide psycho-social care and to provide parenting tips. This was a collaborative effort with the National Parenting Support Commission and United Nations Children's Fund (UNICEF). A psycho-social programme was also developed to assist students, staff and parents cope with the mental health challenges brought on by the COVID-19 restrictions
- The social safety net provisions for the most vulnerable were expanded through the addition of \$347 million by the Ministry of Finance and the Public Service (MOFPS), which provided for the feeding of children at the early childhood level. This amount boosted the total allocation for school feeding to \$5.1 billion (US\$34 million)
- Cash grants were provided through the Ministry of Labour and Social Security (MLSS) to PATH families in May and June 2020, and to vulnerable parents who were challenged in financing their children's education through the COVID-19

Allocation of Resources for Employees (CARE Programme). The expenses covered by the programme included the cost of books, uniforms, and other supplies.

Challenges remained however in adequacy of some provisions and in the physical and emotional disconnect experienced by students.

Lack of engagement resulting in learning loss

Factors that impact learning, including school attendance, classroom engagement, and assessments – were affected, resulting in children not meeting grade-relevant learning targets. It has been estimated that some students have been performing at an entire grade level below their expected level (CAPRI 2021a). This was more evident in students from rural and poor socio-economic backgrounds with lower levels of access to and engagement with remote learning. The effects of the pandemic could therefore result in a learning loss for Jamaican school aged children of approximately 1.2 years (UNICEF 2021). Not only could education loss result in higher attrition and retention rates for vulnerable students, but in the long term it could also impact economic participation as well as higher rates of unemployment among the youth.

1.2 YEARS – ESTIMATED LEARNING LOSS FOR JAMAICAN SCHOOL-AGED CHILDREN.

The GOJ, in response to concerns about learning loss, reported in the 2021 budget presentation that it will provide \$1.0 billion in the upcoming fiscal year to employ temporary teachers to assist students recover from the learning loss that has been experienced during the disruption of face-to-face classes. This will primarily be facilitated through the MoEYI Extra Lessons Programme (See Goal 4).

Food Insecurity

The closure of schools resulted in unavailability of the guaranteed free meals offered by schools, at a time when their own families may be experiencing worsening food insecurity due to a loss of employment and income. Data revealed that 44.0 per cent of households with children experienced food shortages during the COVID-19 crisis; some 6.0 per cent amongst female-headed households, and households with two or more children, 57.0 percent.

In response, the GOJ, through Nutritional Products Limited (NPL) along with private sector entities, alumni organizations, church groups, and other benevolent entities, delivered meals to students to minimize the impact of food shortages. The

MoEYI reported that lunches were delivered to more than 175 000 students on PATH every day for three weeks and breakfast was delivered to 70 000 students until March 2021. Additionally, the GOJ increased the PATH cash allowance by \$150 per student per day of school (See section on Social Protection). Food insecurity is likely to be an emerging challenge, as the pandemic continues and households face an increasing cost of living.

Mental Health

The effects of the pandemic on children's mental health is noted as studies report increases in levels of mental health issues among children. The rate of suicide ideation among children appears to have increased, which is in part attributed to separation anxiety as students have been more or less isolated for over a year (2020–2021) (CAPRI 2021c).

In response, the government through the MoEYI implemented additional psychosocial programmes to assist students, staff and parents cope with the mental health challenges. Psychosocial helplines were set up in collaboration with UNICEF, a Jamaican bank, an NGO, and the National Parenting Support Commission to support parents (CAPRI 2021c). See Figure 3.

The MOHW also introduced initiatives to offer ease of access to mental health support both on an individual and on a community level.

- Healthcare workers and community volunteers were trained in mental health care so they would be better equipped to respond to mental health issues within

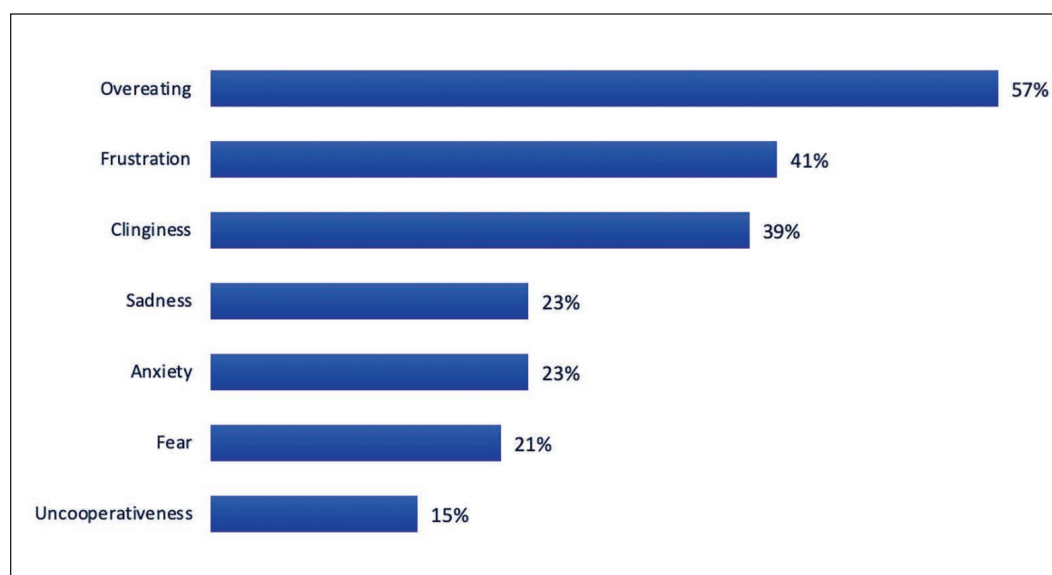


Figure 3: *Emotional Health – The Impact of the COVID-19 Pandemic On Jamaican Children*

Source: UNICEF Jamaica (2020).

- the communities. In addition, a mass media education campaign was launched to promote mental health and prevent mental illness (JIS 2020)
- In 2022, the MOHW, in collaboration with UNICEF and the Caribbean Child Development Centre (CCDC) at the UWI Open Campus, launched a chatline “U-Matter” – to provide mental health support for Jamaican youth aged 16–24 (UNICEF 2022).

The GOJ, through the MOHW intends to focus on destigmatizing mental illness. As part of this initiative, the mental health services at the Bellevue Hospital in Kingston will be upgraded. Some of these improvements will include the:

- development and distribution of guidelines for the management of psychiatric emergencies
- creation of a mental health handbook, slated for release in 2022
- launching of the “Speak Up, Speak Now” campaign which will form part of the efforts to encourage Jamaicans to speak freely about mental illness and to educate the public about mental health.

It is anticipated that these initiatives will increase awareness of mental health issues among the general population and will also be impactful in providing the needed mental health care and support for the nation’s children and youth who are suffering or are at risk of suffering from mental health issues.

Violence against children

Reducing children’s exposure to violence remains a priority which is expressed through policies, programmes and legislation that seek to protect the interests of the nation’s children. Challenges remain however, as students experience bullying at school and witness violence in their community or at home. Schools are a social environment that enable interaction and address the needs of children in various dimensions. Findings from focus groups consisting of parents, teachers, and students, indicated that there are issues with inappropriate disciplinary measures for children attributed to parental frustration caused by financial hardships that resulted from job losses, overcrowding of the home space, and the stress of not being adequately equipped to oversee classes at home, especially for the more vulnerable children (CAPRI 2021b). The National Children’s Registry (NCR) registered fewer reports of child abuse during the COVID-19 period compared with the prior years, however, which may be due to closure of schools where cases are detected and reported.

During the pandemic, the GOJ through the Child Protection and Family Services Agency (CPFSA), implemented new measures aimed at increasing child protection in Jamaica. Among them was the launch of the 211-child abuse hotline in November 2021 that empowers citizens to confidentially report child abuse. Additionally,

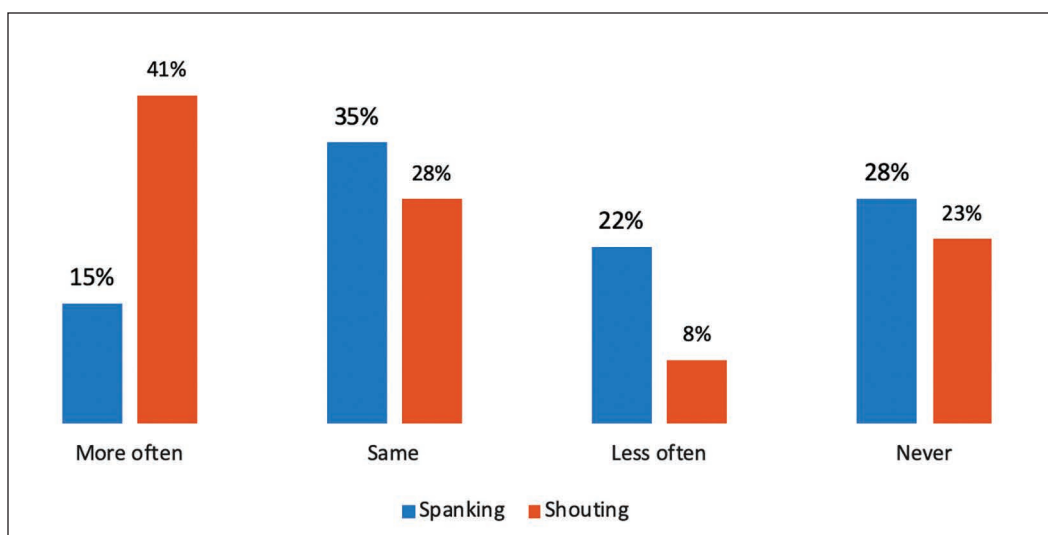


Figure 4: *Violent Discipline: Changes in Frequency of Shouting or Spanking Since COVID-19 Restrictions*
Source: Unicef (2020).

a National Plan of Action for the Integrated Response to Children and Violence (NPACV) launched in 2019 was given renewed emphasis to focus on ending abuse and exploitation of children, particularly child trafficking. See Figure 4.

Effects of schools' closure on teenage girls

Schools also provide a safe space for teenage girls; it is an environment to focus on their personal development, upward mobility, and instils in them an increasing desire for self-actualization. The pandemic-related closure of schools therefore increased the risk for gender based violence. Quantitative data are not yet available for births to teenagers for 2020–2021, however, addressing this issue through legislative, policy and programmatic responses remains a priority of the GOJ, given its potential impact on girls' education and meaningful labour market participation.

Effects of schools' closure on teenage boys

The closure of schools impacted teenage boys as they suffered from loss of learning and engagement as well as negative effects to their health and wellness. This challenge is noted in the context that boys in this age group who are not engaged in structured and supervised education, may be at risk for deviant behaviour.

The disconnect from learning due to resource challenges for effective school-from-home learning, has resulted in boys being more likely to drop out of school, especially those from among the more vulnerable population, some of whom have sought employment in the formal or informal sectors. There is therefore possibility that many

of these boys may not return to the classroom, potentially widening the disparity that exists between girls and boys, especially at higher levels in the education system (Patterson 2021).

Target 4.2: By 2030, ensure that all girls and boys have access to quality early childhood development, care, and pre-primary education so that they are ready for primary education.

Effects of the Closure of Schools on Pre-Primary girls and boys

The closure of schools affected both girls and boys in the pre-primary/basic school age group, particularly the more vulnerable. It is widely acknowledged that there is a close correlation between parenting practices and socioeconomic status – better-educated and higher income earning parents generally raise their children in ways that are more sensitive, receptive, rich, and varied, for example they read and tell more stories and play more with their children (IDB 2020). The opposite tends to be true for children from lower income groups. These differences in parenting and support toward education, were further impacted by the pandemic. The closure of schools meant that the education of pre-primary aged children became largely the responsibility of parents and caregivers, leaving those who did not have the assistance of digitally literate parents or caregivers at a distinct disadvantage. Data reveals that children in this age group had the lowest levels of engagement in distance learning at 75.0 per cent (UNICEF 2021). Unsupervised screen time also increased for these children and from a developmental perspective, many were not able to learn and practice critical early socialization skills. The long-term effect of this setback has not yet been ascertained, but many psychologists have hypothesized that this learning and developmental loss, if not addressed immediately, could result in irreversible developmental loss. There was no data available at the time of this report to disaggregate the effects by gender.

In response to the challenge of engagement many basic school teachers printed work material for parents and caregivers to either collect, or they dropped off and collected same at individual houses in the communities. Teachers experienced challenges due to unavailability of digital devices and connectivity, as well as lack of sustained commitment from parents and caregivers who were required to balance the demands of employment with the increased demand for childcare and home schooling.

The GOJ, through the MoEYI, responded by strengthening its commitment to the Early Childhood Rationalization Programme that had been launched in 2017. This programme seeks to provide children improved access to trained teachers in established certified government-operated infant schools or departments by merging clusters of basic schools as well as subsuming some basic schools into the infant departments of primary schools. Funds were also made available for the fiscal year 2022–2023 for the building of additional early-childhood institutions.

Target 4.3: By 2030, ensure equal access for all women and men to affordable and quality technical, vocational, and tertiary education, including university.

Impact of COVID-19 on higher education

The impact of the pandemic on higher education was similar to other levels. According to the IDB (2020) along with stakeholder consultations, several responses undertaken by the tertiary institutions along with consultations with the various Student Guild-led bodies, in a bid to enable lecturers and students to continue the education process:

- Many institutions provided staff with devices and training in the use of online tools
- Students were surveyed to find out how many had access to devices and the Internet, and efforts were made to assist those students with connection capabilities and devices:
 - ◁ The institutions liaised with local Internet providers to obtain reduced fees for Internet connection for students and staff
 - ◁ A tablet loan scheme was initiated by the UWI Student Guild in 2020, which was later adopted and supported by the institution. This resulted in more than 1 000 tablets being loaned to needy students upon request
 - ◁ Universities and colleges also facilitated students access to the campuses' internet services
 - ◁ Spaces were reconfigured to accommodate the practical components, with students being urged to observe COVID-19 protocols.
- Tertiary institutions introduced a flexi-work policy for staff and provided the tools to deliver classes from home
- The Spring Semester of 2020 was extended into the summer months to compensate for time lost
- Institutions extended the deadline for payment of tuition fees.

The government responded through the strengthening of the HEART/NSTA Trust's strategic business plan for the next five years (2021–2025). This organization is tasked with equipping the workforce for full, decent, productive employment. The Trust will place particular emphasis on training and certifying Jamaicans in emerging skills, developing a digital business model, efficient and cost-effective operations, strengthening partnerships, youth development, lifelong and digital learning, culture development, integration and the facilitation of decent work and contribution to the diversification of Jamaica's economic base.¹ It will also place focus on the restoration of the tourism industry, the provision of business support services, the development of centres of excellence and finishing schools and safeguarding vulnerable groups.

1. HEART/NSTA Trust | Strategic Business Plan 2021–2025 | V.1.1 | December 2020.

Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs, and entrepreneurship

The Effects of the Pandemic on Technical and Vocational Education

Similar to other categories within the education landscape, the technical and vocational areas for youth and adults were also heavily impacted by the pandemic. Most of these skills-based programmes require practicality, hands-on mentorship and coaching from teachers. The closure of vocational institutions prevented the continuation of programmes for many students who were not able to quickly transition to digital learning. Whereas some teachers were able to adapt quickly to the new digital learning environment, students faced challenges in connecting to this modality (UNESCO 2020)

In a bid to encourage and sustain the development of technical and vocational skills, the GOJ implemented several scholarships and initiatives. These included (MOEYI 2022).

- Scholarships amounting to £160 472 (\$29.7 million) which were awarded in the areas of clinical psychology and mental health, food technology (quality assurance), international law, and hydrology and water resources management for study in the United Kingdom (UK)
- Scholarships were provided to the UWI Open Campus for at-risk youth in the PATH programme
- The pursuit of education in Science, Technology, Engineering and Mathematics (STEM) related fields, was promoted with the launch of a tertiary ICT Scholarship under PATH
- The Education Sector of the UNESCO Cluster Office for the Caribbean, together with the MOEY of Jamaica, held a virtual workshop in November 2020 with technical vocational educational and training (TVET) teachers, trainers and directors of training institutions in Jamaica. This workshop titled “Strategies for Continuing Technical Vocational Education and Training (TVET) in Jamaica” sought to identify new challenges and opportunities for the TVET sector, to sustainably address the structural weaknesses and gaps revealed by the COVID-19 pandemic, and to ensure continuity of learning and skills development. Approximately 400 TVET managers were trained (UNESCO 2020).

The pandemic provided opportunity to develop skills capacities and capabilities for distance learning which may be developed and leveraged to strengthen education delivery.

Target 4.5: By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples, and children in vulnerable situations.

The Impact of the Pandemic on Students with Disabilities

There is recognition both regionally and globally that there was a gap in access to online learning materials, for students with disabilities (Parker and Alfaro 2021). Additional obstacles varied from isolation, to increased health risks, and access to inclusive education and technology. These challenges further exacerbated pre-pandemic disability challenges. The situation is more challenging for children and families from lower socio-economic quintiles, who are unlikely to have the resources to obtain the technological and other forms of support needed to adequately facilitate effective distance learning. It is therefore expected that the gap between where children would have been at the end of the school year, and where they are at this point in the pandemic (March 2022), may be wider for children with special needs than for those without (UNICEF 2021).

Before the pandemic, gaps were identified in education provision for children with disabilities, mainly due to the shortage of trained special education teachers, child psychiatrists, and developmental specialists. School-at-home became even more challenging for these students who required special skills and resources to facilitate learning. In response, the GOJ introduced several tangible provisions including COVID CARE grants, the allocation of funds for the empowerment for persons with disabilities and training programs, modern equipment and software for special education institutions across the island, and the establishment of a Braille and Large Print Unit.

Target 4.6: By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy.

Literacy among Youths and Adults

Literacy rates in Jamaica are relatively high among both adults and youth. In recognition of the remaining gaps, the GOJ has recently merged the Jamaican Foundation for Lifelong Learning (JFLL), the agency of the MoEYI tasked with delivering adult and youth learning and lifelong learning interventions from basic literacy to the secondary level with the HEART/NSTA. It is anticipated that this merger will result in the provision of the resources to bolster programme delivery and respond to challenges posed by the pandemic.

Target 4A: Build and upgrade education facilities that are child, disability, and gender-sensitive and provide safe, non-violent, inclusive, and effective learning environments for all.

Impact of the Pandemic on Education Facilities

The pandemic highlighted issues in adequacy and availability of ICT resources in schools, particularly in rural areas, which impacted education delivery. There is need for improvement and upgrade of secondary school facilities to facilitate re-opening of schools. In response to the pandemic, much of the schools' budgets which were earmarked for building maintenance were allocated to support online learning. Improvement in infrastructure will also facilitate reopening of school under COVID-19 containment measures.

In response, the GOJ through partnerships with local Internet providers, installed wi-fi connections in 238 communities. Many private companies also partnered with this initiative by donating computers and tablets to schools and students. Along with the expansion of technology, some schools are slated to benefit from infrastructural improvements. The GOJ has also allocated funding for the expansion of 19 secondary and primary level institutions across the island to expand provision of spaced and to upgrade the schools' infrastructure.

Target 4C: By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing states.

Quality of Teachers

Although COVID 19 temporarily halted teacher migration, the education system had been impacted over the years from the migration of teachers, particularly STEM (Devonish 2021). This was further exacerbated by the pandemic, as few teachers, before the pandemic, had participated in or conducted online or remote teaching. Many junior teachers of Technology stepped up and assumed leadership roles in transforming the schools' Information Communication Technology (ICT) platforms and in training other teachers to use the platforms.

Some of the results of the sector's response included:

- Some 65 000 teachers trained to deliver online classes by August 2020
- The National College for Educational Leadership (NCEL), the public body charged with the training and upskilling of principals and those in other leadership roles in schools, were mandated by the government in May 2020 to equip school leaders to serve, represent and lead school staff in the transition to distance learning.

- The NCEL also introduced several pandemic response courses during the period June–October 2020 to address the gaps and needs that had been identified
- The Jamaica Teaching Council (JTC) introduced courses shortly after the closure of schools. The priority for these courses was to provide remote/online learning delivery skills. The JTC reports that 21 840 teachers (more than 85.0 per cent of the population of teachers in public schools) enrolled in at least one course. The proportion of teachers that received training was highest at the primary school level, at 93.3 per cent. This was followed by secondary schools then pre-primary at 83.1 per cent and 82.9 per cent respectively.

CONCLUSIONS AND THE WAY FORWARD

The COVID-19 pandemic negatively impacted efforts to achieve optimal educational outcomes as the responses to manage the pandemic contributed to some learning loss. It highlighted the weaknesses in the system, which were immediately addressed by stakeholders (teachers, parents, and private sector entities) who partnered with the GOJ to address the emerging challenges faced by students. The necessity of new approaches to delivering educational services, especially digitalization, created new opportunities and built capabilities, to make the education sector more resilient and effective.

Lessons learned through the response will inform education planning both for recovery and for the achievement of SDG 4 through the GOJ's commitment to quality education for all. Teacher training in the use of technology in teaching and the development of more interactive methods of teaching will enhance education delivery. Many communities benefited from an increase in Internet connectivity. Parents assumed a more direct role in guiding, facilitating, and supporting online learning for their children. Many students who did not have the technological resources, such as tablets and computers, were assisted with acquiring these. The online infrastructure was updated in many schools, with work on the physical infrastructure of some schools to begin in the upcoming year.

The critical issues of continued learning loss especially among the more vulnerable, the increasing challenge of disengagement of boys especially in higher education, remain significant challenges for Jamaica.

Recommendations for the way forward include:

- If SDG 4 is to be fulfilled, access to good quality education using digital resources must be enhanced and expanded nationwide. This is critical to ensure that no youth or adult learner will be left behind in the fulfilment of the 2030 Agenda
- There is need to strengthen efforts to re-engaged students in education. Community involvement may be leveraged in this effort. Given the digital divide in many remote communities, opportunities exist to localize educational opportunities at

the community and home levels by empowering and training community leaders, retired teachers, and graduates to support the education of students living in these areas

- There needs to be a general assessment of students at all levels to assess learning loss and learning needs, and strengthen the design and delivery of appropriate responses
- There is need to further develop the capacity and ability of teachers and lecturers at the post-secondary level to redesign and deliver high-quality lessons using digital tools and platforms. This would be delivered through increased training using open access online and digital tools and platforms
- The expansion of technology and the availability of access to the resources needed to equip students and teachers for the new technologically centred learning landscape must be enabled
- Parents and other stakeholders in education should continue to play an increasing role in the education of children
- Additional resources are required to offer psychosocial support services for children and parents
- Expanded access for inclusive and integrated education is required. There is a need to increase support for persons with disabilities and provide access to platforms that accommodate persons with different types of impairments and abilities.

THE COVID-19 PANDEMIC NEGATIVELY IMPACTED EFFORTS TO ACHIEVE OPTIMAL EDUCATIONAL OUTCOMES AS THE RESPONSES TO MANAGE THE PANDEMIC CONTRIBUTED TO SOME LEARNING LOSS. IT HIGHLIGHTED THE WEAKNESSES IN THE SYSTEM, WHICH WERE IMMEDIATELY ADDRESSED BY STAKEHOLDERS (TEACHERS, PARENTS, AND PRIVATE SECTOR ENTITIES) WHO PARTNERED WITH THE GOJ TO ADDRESS THE EMERGING CHALLENGES FACED BY STUDENTS. THE NECESSITY OF NEW APPROACHES TO DELIVERING EDUCATIONAL SERVICES, ESPECIALLY DIGITALIZATION, CREATED NEW OPPORTUNITIES AND BUILT CAPABILITIES, TO MAKE THE EDUCATION SECTOR MORE RESILIENT AND EFFECTIVE.



LABOUR MARKET

This section explores the impact of the COVID-19 pandemic on the Jamaican labour market, with particular reference to the 2030 Sustainable Development Agenda and with digitalization as a cross-cutting issue. The analysis of the impact of the COVID-19 crisis on the Jamaican labour market includes an examination of its effects on the labour force and the economically inactive population. Additionally, in the context of the SDGs, the composition of the labour force by age and sex is of importance. The effectiveness of GOJ's responses to the pandemic and the overall performance of the labour market institutions are also examined, as well as the important lessons from the COVID-19 experience.

BACKGROUND

The COVID-19 pandemic reversed positive trends in the domestic labour market, including increases in the average employed labour force, a reduction in the unemployment rate and improved labour market efficiency. Between July 2011 and January 2020, the employed labour force increased by 189 000 to 1 272 700. Between July 2020 and January 2021 however, the employed labour force declined by 151 100 to 1 121 600 due mainly to the effect of COVID-19 and measures implemented to stem the spread of the disease (STATIN, 2021).

Jamaica registered an increase in the score recorded on the Labour Market Efficiency Index (LMEI) between 2015 and 2017. According to the Global Competitiveness Report 2017–2018, Jamaica recorded a score of 4.5 for the LMEI, up from 4.28 in the 2015–2016 reporting period (ESSJ 2020). In the aftermath of the pandemic, greater efforts will be required to recover, and resume more robust economic growth, while maintaining the commitment to sustainable development goals in the post-pandemic era.

Strategies: Vision 2030 Jamaica –National Development Plan and the SDGs

Vision 2030 Jamaica recognizes that a competitive and enabling business environment supports economic growth and development. A well-functioning labour market is one of the strategic objectives tied to National **Outcome #8 –An Enabling Business Environment**. The Medium-Term Social and Economic Policy Framework 2018–2021 (MTF), included national strategies to (PIOJ 2018b):

- Ensure there is a facilitating policy, regulatory and institutional framework for business development
- Increase access to capital
- Use trade and foreign relations to create an enabling external environment for economic growth
- Strengthen investment promotion and trade facilitation
- Develop an efficient labour market
- Improve the labour environment to enhance labour productivity and worker satisfaction
- Develop the capabilities of micro, small and medium-sized enterprises.

Developing an *Efficient Labour Market* involves targeted efforts to address the factors that reduce the efficiency with which the supply and demand for labour are matched. Key priorities included initiatives to:

- Ensure that education and training programmes equip workers with the skills demanded by a rapidly evolving economy
- Strengthen the application of labour market to signal and improve the mechanisms to bring together the providers and buyers of labour services
- Improve the labour environment to enhance labour productivity and worker satisfaction.

The strategies and actions in MTF 2018 – 2021 contributed to the achievement of the SDGs over the review period – in particular, **Goal 8: Promote sustained, inclusive and sustainable economic growth, full employment and decent work for all**. See Box 1.

The Ministry of Labour and Social Security (MLSS) organizes objectives around two key Vision 2030 national outcomes of *Social Protection* and creating an *Enabling Business Environment*. This includes a commitment to facilitate job placement, a

BOX 2. TARGETS FOR SDG GOAL 8

GOAL 8: PROMOTE SUSTAINED, INCLUSIVE, AND SUSTAINABLE ECONOMIC GROWTH, FULL AND PRODUCTIVE EMPLOYMENT, AND DECENT WORK FOR ALL.

Targets

- 8.1) Sustain per capita economic growth
- 8.2) Achieve higher levels of economic productivity
- 8.3) Promote development-oriented policies that support productive activities, decent job creation and Entrepreneurship
- 8.5) Achieve full and productive employment and decent work for all women and men 8.6) Reduce the proportion of youth not in employment, education or training
- 8.7) Take immediate and effective measures to eradicate forced labour, end modern slavery and human trafficking and by 2025 end child labour in all its forms
- 8.8) Protect labour rights and promote safe and secure working environments for all
- 8.9) Develop and operationalize a global strategy for youth employment and implement the Global Jobs Pact of the International Labour Organization.

successful transition to the use of an electronic payments platform in the management of benefits, and the promotion of a culture of productivity and a healthy industrial relations climate. Policies of the MLSS are aligned with commitments to the national objectives of Vision 2030 Jamaica – National Development Plan and the relevant SDG targets:

- **SDG Target 1.4:** By 2030, ensure that all men and women, in particular the poor and the vulnerable, have equal rights to economic resources, as well as access to basic services, ownership and control over land and other forms of property, inheritance, natural resources, appropriate new technology and financial services, including microfinance
- **SDG Target 4.4:** By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship
- **SDG Target 8.2:** Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including, a focus on high-value-added and labour-intensive sectors
- **SDG Target 8.5:** By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value

- **SDG Target 8.8:** Protect labour rights and promote safe and secure working environments for all workers, including migrant workers; in particular women migrants, and those in precarious employment.
- **SDG Target 8. B:** By 2020, develop and operationalize a global strategy for youth employment and implement the Global Jobs Pact of the International Labour Organization.

In particular, commitment to the “leaving no one behind” principle was reflected in the policies and programmes that targeted the poor and vulnerable, such as facilitating transfers to PATH beneficiaries and targeting workers in the worst-affected industries for job placements, through the Labour Market Information System (LMIS).

The Jamaican private sector plays a partnering role in the achievement of Vision 2030 Jamaica and the SDGs. Organizations such as the Jamaica Employers’ Federation (JEF) partner with International Labour Organization (ILO) to promote awareness and training among its membership on the *Decent Work Agenda*, and pursue initiatives related to gender equality, occupational health and safety and support for the tripartite negotiation machinery in industrial relations.

IMPACTS

The COVID-19 pandemic impacted the wider economy, employment, and working hours and modalities which are directly related to labour market performance.

Productive sectors and incomes

The economy contracted by 9.9 per cent between January and December 2020 (ESSJ 2020) as a result of the COVID-19 pandemic, causing widespread loss of income as employees were laid off or worked reduced hours. The contraction was especially pronounced in the Accommodation and Food Services (29.5 per cent), as well as Transportation and Storage (21.0 per cent), Construction (17.0 per cent), Manufacturing (16 per cent) and Art, Entertainment Recreation and other Services (12.1 per cent) sectors.¹

According to STATIN, by July 2020, nearly 60.0 per cent (57.4 per cent or 515 200) of households experienced a decrease in income while the income for 37.9 per cent (339 600) of households remained unchanged. Of the households that experienced a reduction in income, 262 900 (51.0 per cent) reported that their source of income was wages. For 166 200 households, the non-farm family business was their source of income, while 106 300 earned their income from family farming, livestock, or fishing.²

Other sectors impacted included:

1. STATIN (2020) *Jamaican Labour Market: Impact of COVID-19*.

2. Ibid.

- The Domestic/Household Workers: Some members experienced a reduction of their hours from weekly to daily hours (2 or 3 days) or had to transition to living in the work environment permanently to keep their jobs
- Education Sector: While the loss of jobs by teachers within the public school system was minimal, jobs in areas such as maintenance, concessionaires, transportation, and vending were impacted because of the change to virtual learning. Within private schools, in particular basic schools, job losses among teachers and employees in other areas were high
- Approximately one-fifth of small and medium-sized firms reported laying off between 41.0 per cent and 80.0 per cent of their workers, while only 6.2 per cent of large firms reported lay-offs of a similar magnitude. Although more than half of the firms laid-off workers, just over a third (37.6 per cent) had engaged in redundancy exercises up to the end of May 2020, with 14.0 per cent of the respondents making between 1.0 per cent and 20.0 per cent of their workers redundant and 10.1 per cent making between 81.0 per cent and 100 per cent of their workers redundant).³

As the period of reduced work hours and lay-off of workers became extended as a result of the pandemic, a large number of employers made workers redundant, or workers opted for redundancy, per provisions under the Employment (Termination and Redundancy Payments) Act. This contributed to the displacement of workers and potential labour shortages when companies resumed operations.

For occupational categories, reported redundancies of 1 919 workers or 38.9 per cent were recorded in Services and Sales, followed by Clerical Support at 1 235 or 25.1 percent, and Managers at 224 or 4.5 per cent (MLSS, 2021). One half or 2 483 of the workers who were made redundant were reported from the Accommodation and Food Service Activities Sector, which also had the largest number of the establishments which reported redundancies, 77 or 24.1 per cent. The heightened vulnerability of the hospitality, creative and related service sectors resulted in almost 30.0 per cent reporting lay-offs of 81.0 per cent to 100 per cent of their workforce.⁴

Employment and Labour Force Participation

The pandemic impacted employment as economic activity slowed during 2020. The employed labour force declined by 93 300 persons over the October 2019 to October 2020 period resulting in an increase in unemployment by 3.5 per cent to 10.7 per cent. Male unemployment increased by 2.7 per cent to 8.7 per cent as 41 100 less persons were employed and female unemployment increased by 4.6 per cent to 13.2 per cent from 52 200 less women employed. The overall labour force declined by 50 300 persons

3. Source: Report on Impact of COVID on Businesses

4. Source: Report on Impact of COVID on Businesses

Table 1: Select Indicators 2017–2021

Selected Indicators	2017	2018	2019	2020	2021
GDP at Constant (2007) Market Prices (\$ B)	875.5	892.1	900.0		
Growth in GDP at Constant (2007) Market Prices (%)	1.0	1.0	0.9	-9.9	
Private Remittance Inflows (US \$ M)	2 305.3	2 345.8	2 405.6	2 905.0	3 497.1
Labour Force ('000)	1 346.8	1 334.9	1 348.0	1 297.7	1 328.7
Male	721.5	718.5	727.7	704.6	714.8
Female	625.3	616.4	620.3	593.1	613.9
Labour Force Participation Rate	64.5	64.0	64.5	62.0	63.4
Male	71.3	70.4	71.0	69.5	69.7
Female	59.1	57.9	58.5	56.7	56.9
Total Employment ('000)	1 207.1	1 219.2	1 251.5	1 158.2	1 234.8
Male	669.7	672.2	684.4	643.3	675.9
Female	537.4	547.0	567.1	514.9	558.9
Total Unemployment Rate (%)	10.4	8.7	7.2	10.7	7.1
Male	7.2	6.4	6.0	8.7	5.4
Female	14.1	11.3	8.6	13.2	9.0

Source: Compiled from PIOJ, BOJ and STATIN

Note: Labour force indicators reflect results from October survey by the Statistical Institute

and labour force participation declined by 2.5 per cent, indicating that more persons left the labour force even with an increase in the job seeking rate.

Employment data indicates that women were slightly more affected by loss of employment. The Labour Force Survey documented a decline in October 2020 of 9.2 per cent (52 200 females) and 6.0 per cent (41 100 males) for female and male employment relative to 2019 (Table 1). Employment levels had been growing yearly up to 2019.

Unemployment

There was a record level of job losses (135 800) for July 2020 compared with the corresponding period in 2019, and a quarterly unemployment rate of 12.6 per cent. This mainly reflected the impact of COVID-19 and measures (closure of businesses and limits on mobility) implemented to halt the spread of the virus locally and globally. The number of unemployed grew by 28.5 per cent in October 2020 when compared with October 2019.

There was a deterioration in the labour market in 2020 relative to 2019, with an unemployment rate of 10.2 per cent, compared with 7.7 per cent in 2019 (Table 1).

Table 2: Unemployment by Major Demographic Groups, 2017–2021

Unemployment by Major Demographic Groups (October Survey) '000	2017	2018	2019	2020	2021
Total	139.7	115.7	96.5	139.5	93.9
Youth (14–24 yrs.)	53.4	50.2	43.3	55.0	37.3
Adults (25 yrs. and over)	86.3	65.5	53.2	84.5	56.6
Male	51.8	46.3	43.3	61.3	38.9
Youth (14–24 yrs.)	22.7	23.7	20.7	26.1	17.7
Adults (25 yrs. and over)	29.1	22.6	22.6	35.2	21.2
Female	87.9	69.4	53.2	78.2	55.0
Youth (14–24 yrs.)	30.7	26.5	22.6	28.9	19.6
Adults (25 yrs. and over)	57.2	42.9	30.6	49.3	35.4

Source: Statistical Institute of Jamaica Labour Force Survey 2017–2021

Unemployment by Age and Sex

Unemployment increased across age groups and sex. The number of unemployed males and females differed significantly, with more women being impacted by the declines. Over the October 2019 to October 2020 period, unemployed females increased from 53 200 to 78 200 or 47.0 per cent. The number of unemployed males increased from 43 300 to 61 300 or 41.2 per cent over the same period.

The number of unemployed youth moved from 43 300 in October 2019 to 55 200 in October 2020. This represents a 27.4 per cent increase in youth unemployment relative to October 2019. Of the unemployed youth, 52.6 per cent were females. The percentage decline in youth employment was higher for females (27.8 per cent) than males (26.1 per cent) relative to October 2019.

The adult (25 years and over) unemployed population was measured at 84 500 persons in October 2020, an increase of 58.8 per cent over October 2019. Adult female unemployment grew by 61.1 per cent to 49 300, while adult male unemployment grew by 55.7 per cent to 35 200 (Table 2). See Figure 5.

Other aspects of labour market activity, such as overseas employment programmes, showed differences in male and female participation based on the industry. Males accounted for over 90.0 per cent of participants in the US and Canadian farm work while females accounted for 53.6 per cent of the participants in the US Hospitality programme. Based on data from the ESSJ 2020, employment in the overseas employment programme declined by 17.3 per cent, partly due to the impact of the pandemic.

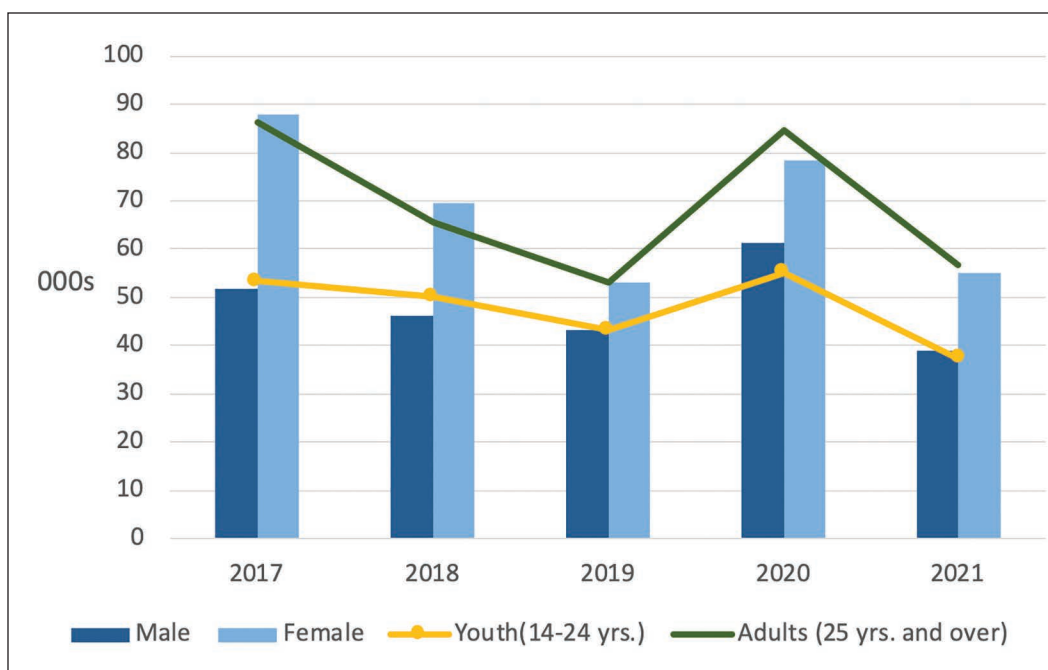


Figure 5: *Unemployment by Major Demographic Groups*

Source: Statistical Institute of Jamaica

Hours of Work

In addition to reduced employment levels, the impact of the pandemic was also seen in reduced working hours as business activities declined in response to the restrictions implemented to contain the spread of the virus. Data from a COVID-19 special module of the July 2020 quarterly Labour Force Survey showed an increase in the number of persons who worked fewer hours per week and a reduction in the number of persons who worked for 35 hours or more per week. It was reported that 211 000 persons worked part-time (34 hours or less) compared with the 116 000 recorded in July 2019. On the other hand, there was a 17.4 per cent reduction in the number of persons that reported working 35–40 hours per week to 490 700 persons compared with the corresponding period in 2019.⁵

Productivity

Productivity was also affected by the COVID-19 pandemic and the measures implemented to curtail its spread. According to the Jamaica Productivity Centre (JPC) following the onset of the pandemic, there was a decline in real value-added and employment, as demand weakened and supply chains were interrupted globally. The *Labour Market Task Force Report* also highlighted several issues related to the

5. Source: PIOJ ESSJ 2020 and STATIN 2020.

pandemic's impact on productivity. For example, working from home and in cyberspace produced many benefits and presented clear opportunities for improved productivity. At the same time, inadequate preparation physically and mentally for employees in terms of appropriate infrastructure, the fact that some jobs in the manufacturing and services sectors cannot be done from home, and the dual responsibilities of working and assisting children who are also in online school a result of school closures presented challenges in some cases. More than one-half (52.6 per cent or 70 000) of the persons who worked from home stated that they did not experience any challenge while working from home. Of those who experienced challenges, one-quarter (25.2 per cent or 33 500) had internet connectivity issues followed by childcare responsibilities (9.3 per cent or 12 400) and home duties (8.2 per cent or 10 800).⁶

Informal workers

Challenges of inclusion of informal workers were recognized as this category of workers were unattached to the formal system through which benefits were provided. A report prepared by CAPRI noted that 'Pandemic-related relief often excluded informal sector workers and businesses, though informal small businesses have experienced some of the worst impacts, particularly as it relates to their household expenses (CAPRI 2021).

Labour Migration

The pandemic and the attendant border closures nationally and internationally, as well as the general restrictions in global travel and the decline in economic activity in the tourism sector contributed to a decline in work permit applications. The overall number of persons participating in the overseas employment programmes declined by 17.3 per cent when compared with 2019.

Labour Market Institutions

The Labour Market Information System (LMIS)

The pandemic affected placement in industries, and reflected in reduced placements through the LMIS. Increased promotion of the LMIS web and mobile application and a shift from in-person to virtual platforms for the delivery of services resulted in the registration of some 897 jobseekers. To provide further support for various categories of jobseekers, the LMIS team targeted job seekers that were more likely to have experienced job loss as a consequence of the pandemic and engaged in several partnerships with stakeholders to promote the LMIS and improve accessibility.

6. STATIN (2020) *Jamaican Labour Market: Impact of COVID-19*, and Labour Market Task Force Report

Legislation

The widespread resort to redundancy during the COVID-19 pandemic was largely an unforeseen consequence of the provisions of the Employment Termination (Redundancy Payments) Act (2008) and resulted in the permanent displacement of workers and some post-COVID-19 labour shortages. Additionally, it was costly to employers, especially SMEs. The Ministry of Labour and Social Security (MLSS) reported that over \$ 4.0 billion in redundancy payments were processed over the 2020–2021 period. Furthermore, the COVID-19 pandemic impacted efforts to strengthen the legislative framework for improving the labour market. Progress with the Occupational Safety and Health and Flexible Work Week was stalled during the emergency, but these are areas of priority going forward.

INITIATIVES IN RESPONSE TO THE COVID-19 PANDEMIC

The government acted with urgency to contain the crisis in the face of significant challenges, including limited resources, information gaps and challenges in coordination and compliance with the necessary adjustments. This effort required collaboration with the private sector and other stakeholders to ensure effectiveness and maintain the commitment to sustainable development as well as ensure that the needs of the most vulnerable were addressed.

Government

Among the key initiatives undertaken by the GOJ to reduce the impact of the pandemic were:

- Within the public sector, “work from home” or, teleworking, was adopted as a standard modality, coinciding with the periodic restrictions on movement, which affected Public Sector workers across the island. This coincided with the accelerated adoption of digital technologies in conducting Government business
- Several income-replacement programmes, aimed at providing support to vulnerable workers, especially in sectors adversely affected by closures and reduced business such as tourism, restaurants, transportation and small business operators. For example, under the government’s \$10-billion COVID-19 Allocation of Resources for Employees (CARE) Programme – BEST Cash is one of eight components aimed at cushioning the economic impact of the COVID-19 pandemic by providing financial assistance to workers and businesses adversely affected in the tourism sector
- The MLSS actively implemented various measures designed to reduce the impact of the pandemic on workers and the vulnerable population, as well as improve labour market efficiency. This included:

- Processing redundancy payments under the employment (Termination and Redundancy Payments) Act
- Promoting digitalization by use of electronic payment platforms for programme beneficiaries
- Increasing the use of online communications for executing MLSS functions, for example conciliation and dispute resolution
- Using the LMIS to support redeployment of displaced workers. The LMIS database collects information from workers who are made redundant and makes contact with job-seekers when vacancies arise. Special efforts were made to assist workers in the Accommodation Sector as well as the Business Process Outsourcing (BPO) Sector which were both severely impacted by the pandemic
- Conduct Labour Market Research, sector studies, Skills Demand Survey and Tracer Studies for labour demand programmes and other emerging areas, and use standardized data on labour migration to inform labour market analysis. This supports the alignment of education and training with the labour market needs.
- Execution of labour market studies to inform measures to promote adaptability and flexibility in the workforce
- Advance development, promotion and awareness of the National LMIS and other sources of labour market information including the Electronic Labour Exchange (ELE).

Private sector responses

Faced with COVID-19 restrictions, which severely impacted business operations, many companies were forced to close or curtail operations, reducing staff or working hours. Adaptive responses included: digitalization, teleworking models or “work from home”, technology upgrades and increased awareness of, and attention to, disaster planning. The following details some of the main responses from the private sector:

- Many companies accelerated digitalization and use of e-commerce platforms to deliver services. This was already an ongoing process in the financial sector, but the practice became more widespread as companies increasingly adapted to the physical restrictions imposed by the pandemic
- Working from home was widely applied in the Public Sector, but private sector companies also used this strategy where practicable. For example, firms within the BPO sector introduced work from home
- Technology upgrades in some cases were prompted by work from home and the need for enhanced information security systems
- As a result of the pandemic and a need to implement mitigating strategies, there was increased awareness of, and attention to disaster planning.

Successes

The measures taken in response to the COVID 19 pandemic were conducive to increased application of technology, especially in communication, e-commerce and remote work. This has created new sources of efficiency in both the public and private sectors as clients became more willing and enabled to use information technology. The MLSS reported that the use of online services by PATH beneficiaries increased from 14.0 per cent to 43.0 per cent. As business operations, led by financial institutions, increasingly transitioned to online business models, there was increased efficiencies and lower costs.

Labour market responses to the COVID-19 restrictions has resulted in a level of resilience in the workforce, as many workers opt to change careers or choose the option of self-employment. To a certain extent, this contributes to post-COVID-19 labour shortages in some areas (the hospitality sector had increased vacancies as entities began their recovery from the pandemic).

Both private and public sector officials deemed the responses to the COVID-19 pandemic to be a qualified success, while some challenges – largely structural – remain. There was particular satisfaction with the results of efforts to promote online services, and businesses as a whole to have done well in adjusting to COVID-19 restrictions, notwithstanding that certain sectors, such as Live Entertainment, had to bear the brunt of the disruptions, given the need for physical proximity.

Challenges

The COVID-19 pandemic and the responses to the impact of the emergency on the labour market revealed certain emerging issues and challenges which are to be addressed in recovery. These include the need for accelerated growth to make up for GDP lost during the pandemic; the effects of the disruptions on plans to develop a more efficient labour market; youth employment; the effects of the pandemic on achieving ILO Core Labour Standards and SDGs; the effect of structural weaknesses including poor infrastructure, on the ability to manage and recover from the pandemic.

- Additional efforts will be required to secure investments needed to restore production to its pre-pandemic levels and, further, to achieve additional growth to continue on the growth trajectory.
- The non-tangible impact of the disruption in many areas, for example, the likely effect of learning loss on the future labour force, the effect of delayed implementation important legislative and regulatory reforms to improve labour market efficiency and increase national competitiveness is considered
- Persistent unfavourable trends relating to youth employment are of concern. Achieving “a global strategy for youth employment” and implementation of

the Global Jobs Pact of the International Labour Organization (**Target 8. b**) are directly affected. Structural barriers underlie the continuous decline in youth engagement in the labour market, for example, unequal access to good quality education has implications for labour market outcomes

- Job losses have important implications for ILO Core Labour Standards, Specific ILO Conventions and the ILO Decent Work Agenda. Jamaicans laid off in the hardest-hit sectors are mostly unable to obtain other forms of employment due to rigidities in the labour market, such as low skill levels which make it difficult for labour to be reallocated easily to other sectors
- The length of time workers had to be laid off as a result of business closures or down-scaling triggered increased redundancies under the provisions of the Employment (Termination and Redundancy Payments) Act
- The effectiveness of responses to the pandemic was hampered by structural weaknesses including poor infrastructure, particularly communications. Limited internet connectivity made distance learning and the use of online services difficult for sections of the Jamaican population.

LESSONS LEARNED

The COVID-19 pandemic and the measures to address its impact brought to the fore several noteworthy issues to be considered in assessing the impact and designing strategies for recovery and improving preparedness and resiliency in the face of future emergencies.

- A key lesson is the need for preparedness for emergencies such as the COVID- 19 pandemic. Small Island Developing States (SIDs) like Jamaica were in an even more vulnerable position, given resource constraints, which affected areas such as hospital bed capacity, availability of medical personnel and access to vaccines. The need for more robust and comprehensive disaster planning was therefore highlighted
- While the response of the GOJ has overall produced good outcomes there is opportunity for improved efficiency, in terms of speed of response and consistency of implementation. As in other countries, the difficulty of balancing safeguarding public health and staving off economic collapse meant that decisions such as the scope and timing of restrictions on movement had to be carefully considered. This was complicated by the emergence of new strains of the virus, with the overall effect of recurrent spikes and associated uncertainty, which impacted the labour market
- A Socio-Economic Impact Assessment of COVID-19 and Policy Options in Jamaica found that the groups in the labour market most affected by the pandemic included: persons employed in accommodation, transportation, entertain-

ment, and recreation; “elementary occupations”, consisting of the least skilled and lowest earners; women, especially female-headed households, and those living on or below the poverty line; and youth who tend to be in low-paying, contractual employment. There is need to strengthen existing targeted interventions for these groups

- The prominent role of digitalization was a major highlight of the responses to the COVID-19 crisis. The country as a whole is transitioning to a new information-technology-driven modality, which augurs well for increased labour market efficiency. Efforts are ongoing to narrow the digital divide, to ensure that vulnerable groups such as rural residents and small and informal businesses can adopt the relevant technologies in a timely and effective manner
- The need for monitoring and data systems was highlighted. The opportunity exists to strengthen monitoring of the performance of the Labour Market in terms of Sustainable Development Goals and adherence to the major elements of the ILO Decent Work Agenda and other standards
- The attitude of the general public and in particular workers, to compliance with policies designed to minimize the impact of the pandemic, (the regulations under the Disaster Risk Management Act and workplace protocols) highlights the important role of public education
- The COVID-19 experience exposed legal and constitutional issues in the management of public emergencies, especially those relevant to the safe working environment. There is a need for greater clarity and consistency in this area, as well as in public education, to ensure more coordinated and compliant responses to similar future emergencies. The case for Occupational Safety and Health legislation, for example, has been made more urgent
- There is a need to examine the effectiveness and progress of labour legislation in light of the impacts of the pandemic. COVID-19 has highlighted the challenges related to the application of Jamaica’s local labour legislation in responding to crises such as pandemics, natural disasters and global financial crises. As pointed out in Ying (2020) ratification of ILO Conventions and Core Labour Standards and translating them into local labour legislation has been a slow process. Legislation in need of urgent attention includes:
 - ◁ Employment (Termination and Redundancy Payments) Act (2008): Activation of redundancy after 90 days proved a challenge during the pandemic. Some employers are advocating flexibility (e.g. by extension to 180 days)
 - ◁ Disaster Risk Management Act: Workplace mandates related to COVID-19 have been challenged
 - ◁ Occupational Safety and Health Legislation
 - ◁ Flexible working days
 - ◁ Contract for Services.

There is a need to plan for improved resilience in the face of national emergencies. This includes strengthening of the social protection system providing for unemployment relief and improved mechanisms to ensure that needs to the vulnerable are safeguarded.

CONCLUSIONS

- The COVID-19 pandemic and the national response prioritizes the SDGs as well as the economic growth programme
- In terms of the economic growth programme, the main impact, especially evident in 2020 and 2021, was the shock to the economy, impacting on the gains in macroeconomic stability and associated improvements in external accounts, fiscal balance, investments, and employment and inflation targets. Reduced employment followed the closure of businesses so that the overall unemployment suffered declines not seen since 2017
- Most Sustainable Development Goal targets were affected by the economic downturn:
 - ◁ **SDG Target 1.4:** Most economic sectors were affected by the pandemic and measures to contain it, as businesses resorted to lay-offs and redundancies
 - ◁ **SDG Target 4.4:** COVID-19 restrictions impacted education and training, creating a “learning gap” which is currently being addressed
 - ◁ **SDG Target 8.2:** Loss of income and employment occurred especially in certain key service sectors (Tourism, Entertainment, and Business Process Outsourcing). However, in response, there is an increased adoption of technology, such as e-commerce and digitalization, which may contribute to increased productivity. GOJ strategies for promoting diversification, innovation and value-added industries also include Skills training, vocational training and lifelong learning to enable workers to respond to labour market demand and seize employment and entrepreneurship opportunities
 - ◁ **SDG Target 8.5:** Employment declined in all sectors except Government services, and overall unemployment increased. Labour force participation also declined as workers left the labour force and many did not return to the labour force or employment after restrictions were reduced. Proportionally, women were more affected by the loss of employment than men. Female participation in overseas employment, increasing in recent years, received a setback as major programmes were curtailed as a result of the travel restrictions caused by the pandemic
 - ◁ **SDG Target 8.8:** The LMIS continued to operate with a renewed focus on COVID-19 impacted workers, contributing to efficiency in the labour market.

However, important labour market reforms – including legislation that has been delayed – have been further delayed by the COVID-19 pandemic

- ◀ **SDG Target 8. b:** Youth were disproportionately affected by unemployment and youth employment continues to suffer from structural rigidities in the labour market.
- The COVID-19 pandemic impacted both businesses, and the labour force. Income was drastically reduced for prolonged periods, and a significant reduction in domestic consumption amplified adverse multiplier effects. However, responses to the pandemic that sought to mitigate impacts were consistent with the resources available and in many cases had the desired effects while facing severe challenges
- Major challenges remain as recovery is initiated in the face of uncertainties. Many of these are structural and require long-term strategies. Extraordinary measures may be required to reverse the impact of the pandemic and restore the country to a path of sustainable growth

RECOMMENDATIONS

The framework for a recovery programme for the labour market is being developed by the COVID-19 Labour Market Taskforce, established in late 2020. Measures recommended to increase resiliency in the face of crises similar to the COVID-19 pandemic include:

Emergency Management and Infrastructure

- Improve preparedness by developing comprehensive emergency preparedness and response plans
- Improve coordination in emergency planning (e.g., with external partners)
Improve data collection and monitoring systems
- Promote increased digital literacy (digitalization) across all demographic groups
- Upgrade information infrastructure and improve access to vulnerable population.

Economic Recovery

- Response measures implemented during the COVID-19 crisis such as income replacements, unemployment benefits, etc. should be institutionalized as priority:
- Income replacement, fiscal support; supporting the continued purchasing power of people who lose jobs and means of livelihood
- Incentivising firms not to lay off workers (e.g., by payroll support programmes).

Social Safety Nets

- Expand social safety nets, and unemployment insurance, for example, strengthening the National Insurance Scheme (NIS). Unclaimed balances of NHT contributors could be applied to NIS accounts of contributors. A more unified system of social insurance should be provided (linking NIS and NHT contributions). A study to determine the feasibility of unemployment insurance is among the recommendations of the COVID-19 Economic Recovery Taskforce Report and is to be implemented.

Strengthening Labour Market Institutions

- Re-examine the legal framework for the management of emergencies (Disaster Risk Management Act) to ensure better compliance
- Resolving urgent issues and challenges related to local labour laws as a result of the impact of disruptive factors such as COVID-19 on the Jamaican Labour Market, to ensure implementation of reforms of occupational safety and health, flexible workweek and employment (Termination and Redundancy Payments) legal framework
- Upgrade and extend the LMIS.

OUTLOOK

Despite the unprecedented challenges posed by the COVID-19 pandemic, the Jamaican economy registered economic growth in the first quarter of the new fiscal year. For the April to June quarter of FY 2021/22, an estimated real economic growth of 12.9 per cent was recorded over a similar quarter for FY 2020/21. The macro-economic fundamentals have improved and positive economic growth is expected to facilitate the beginnings of a recovery in FY 2021/22, all things being equal. Labour market conditions are expected to improve with higher employment levels as the economy rebounds from the COVID-19 restrictions of 2020–2021 (MOF Fiscal Policy Paper 2021/2022). The immediate post-COVID-19 scenario however contains areas of uncertainty in both the international and the domestic environments. Strengthening the policy and planning processes guided by national goals and the Sustainable Development Goals have formed part of the government's response through the crafting of the new medium term socioeconomic policy framework (MTF) 2021/2024.

Access to decent work will remain a priority for the GOJ in the upcoming year and this will guide labour market policy and programme development as efforts are made to strengthen labour market resilience. The MLSS will continue to strengthen its operations.



TOURISM

This section surveys the impact of the COVID-19 pandemic on the Jamaican tourism industry with particular reference to the sustainable development agenda. The report covers the period 2019 to 2021 and examines the effects of the COVID-19 pandemic and related measures to contain it, on the performance of the tourism industry. The report pays particular attention to the extent to which the tourism sector's ability to meet national development and Sustainable Development Goals (SDGs) was affected, and strategies were put in place to facilitate recovery and achievement of the goals.

CONTEXT

Tourism is a key sector in the Jamaican economy, accounting for an estimated 9.7 per cent of Domestic Product (GDP) in 2019 and providing employment to 161 500 workers in tourism and related activities, accounting for 14.3 per cent of the employed labour force.¹ Tourism accounts for 10.0 per cent of government revenues. In the four years before the COVID-19 pandemic, tourism was the major earner of foreign exchange. The pandemic had a significant negative impact on global tourism, and the impact on Jamaica's tourism sector was correspondingly severe. The severe contraction in tourism activity – both stopover and cruise visitors – was in line with similar trends across the Caribbean, where the economies are similarly dependent on tourism especially on visitors from the United States of America, Canada and Europe, regions severely

1. Jamaica Labour Market: Impact of COVID-19

affected by the pandemic. As a result, tourism arrivals dropped to almost zero, and hotels and resorts witnessed massive cancellations.

After years of steady growth, Real Value Added (RVA) for the Hotels & Restaurants industry fell by 53.5 per cent in 2020 relative to 2019 as visitor arrivals declined sharply following global responses to the pandemic, which included widespread travel restrictions and a virtual cessation of airline flights (ESSJ 2020). The decrease was associated with a sharp reduction in stop over Arrivals and Cruise Passengers in 2020.

However, the tourism sector has proven to be fairly resilient and has shown signs of recovery as the most stringent restrictions on travel became relaxed in late 2020 and 2021. Visitor arrivals are projected to return to pre-COVID-19 levels by 2023–2024, and employment in the sector has increased. The tourism sector now seeks to return to pre-pandemic levels of performance and to achieve its targets under Vision 2030 Jamaica—National Development Plan and the Sustainable Development Goals while strengthening its capacity for disaster management and continuity of tourism business in the future.

Tourism Sector, Vision 2030—National Development Plan and the SDGs

The tourism sector represents an important component of the Jamaican economy. Before the pandemic, the sector was on a trajectory of steady growth. The global tourism outlook was positive: according to the UN World Tourism Organization's (WTO) Tourism 2020 Vision, international arrivals were expected to grow by 4.1 per cent annually to 2020, with long-haul travel projected to grow by 5.4 per cent. Between 2015 and 2019, visitor arrivals for Jamaica grew at a rate of around 4.0 per cent annually.

Under Vision 2030 Jamaica—National Development Plan the tourism sector is focused on National Outcome # 12- “Internationally Competitive Industry Structures: Tourism”. This entails the sector developing and implementing strategies and actions, specific to tourism, toward meeting its vision of “an inclusive, world-class, distinctly Jamaican tourism sector that is a major contributor to socio-economic and cultural development, with a well-educated, highly skilled and motivated workforce at all levels within a safe, secure and sustainably-managed environment”. Table 3 shows the targets set under the Tourism Sector Plan for 2018–2021 and the actual outcomes. Performance in 2020 was significantly reversed due to the impact of the COVID-19 pandemic. See Table 3.

The *Tourism Sector Plan*, finalized in 2009, had the following specific objectives for the tourism sector:

- Widen local stakeholders' participation in the tourism sector
- Improve training and working conditions at all levels
- Promote investment and economic linkages
- Diversify our tourism product, source markets and market segments

Table 3: Targets and Actual Performance of Tourism Sector 2018–2020

National Outcome # 12 – Internationally Competitive Industry Structures-Tourism				
National Outcome Indicators	Targets	Actual		
	2018–2021	2018	2019	2020
Percentage change in foreign exchange earnings from tourism	>5.0	11.0	10.2	-65.5
Percentage change in visitor arrivals (stopover)	4.5–5.0	5.1	8.4	-67.2
Percentage change in visitor arrivals (cruise)	5.0–5.5	-4.0	-15.9	-71.1
Percentage change in the number of persons employed in the accommodation sector	3.0	3.7	5.9	-25.9

Source: PIOJ, ESSJ 2018–2020, Compiled with data from the Statistical Institute of Jamaica MTF 2018–2021

- Improve standards and levels of customer service
- Increase the value earned and retained from each tourist
- Increase the use of Jamaican inputs and culture in all areas of the industry
- Strengthen the integration of tourism development with sustainable land use planning and environmental management.

The stated National Outcome for tourism is aligned with several key SDGs, including:

- **Goal 8 – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all:** the MOT supports sustainable development of the tourism sector, development of the tourism workforce, and decent work agenda inclusive of pension schemes for tourism workers
- **Goal 11 – Make cities and human settlements inclusive, safe, resilient and sustainable:** support for sustainable development of tourism facilities accommodation and attractions and concern for affordable housing of tourism workers
- **Goal 12 – Ensure sustainable consumption and production patterns:** commitment to environmentally friendly “green tourism” strategies, prioritizing resource conservation and reduction of negative environmental impacts
- **Goal 13 – Take urgent action to combat climate change and its impacts.**

Because much of the tourism activity takes place in the coastal and marine zone (“sea, sun and sand” model) as well as in the natural environment (ecotourism) the tourism sector indirectly contributes to **SDG 14 and 15:**

- **Goal 14 – Conserve and sustainably use the ocean, seas and marine resources for sustainable development**
- **Goal 15 – Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss.**

Tourism affects wide areas of social and economic life – directly or indirectly, as such, the Tourism Sector Plan is also aligned with the Sustainable Development Goals across several other targets, through initiatives such as the Community Tourism Strategy and Rural Economic Development Initiative (REDI), with impacts on the following goals:

- **Goal 1** – End poverty in all its forms everywhere
- **Goal 2** – End hunger, achieve food security and improved nutrition and promote sustainable agriculture

Other characteristics of the tourism sector affect the cross-cutting themes of inclusiveness, gender equity and technology. For example:

- A high proportion of tourism workers are women
- A large number of tourism operators are MSMEs and in the informal sector
- Low-skilled labour and seasonal employment account for a high proportion of the tourism workforce
- Major tourism entities are located in or near rural communities with high concentrations of poverty, so their regional and local impact may be significant
- Tourism employees and operators have unequal access to technology including e-commerce solutions, digitalization and may thus be at a disadvantage in adjusting to alternative modes of working and doing business.

These characteristics were of particular relevance during the COVID-19 pandemic, as stakeholders had to find strategies to deal with various challenges of vulnerable groups within the tourism sector, such as informal operators and tourism MSMEs (e.g. craft vendors, taxi operators).

The MOT seeks to implement the SDGs through the various programmatic areas, such as:

- **SDG 8:** Tourism Workers Pension Program ('decent work' agenda); the tourism linkages program (economic growth and employment)
- **SDG 13:** The MOT works collaboratively with other sectors to contribute toward the goal of reducing climate change. One of the major components of the revision of MOT's Sustainable Tourism Master Plan – Tourism Strategy and Action Plan focuses on addressing climate change impacts and strategies to build resilience in the tourism sector under the Sustainable Management Plan. The MOT in collaboration with the University of the West Indies also launched the Global Tourism Resilience and Crisis Management Centre
- **SDG 14:** Several tourism programmes focus on the local beaches for example. The Tourism Enhancement Fund (TEF) also provides financial support to marine parks and coastal environmental projects

- The Cabinet approved the Concept Paper for the Revision of the Community Tourism Policy (2015) in December 2021. This will address climate change resilience in the communities, gender equality and women's empowerment and inclusiveness.

Tourism value chain

Disposable income drives the tourism market; it is therefore sensitive to international economic conditions, particularly in countries that are the major sources of visitors. The tourism sector has an extensive value chain, incorporating several sub-sectors:

- **International transportation:** The airline and cruise shipping sectors are integral to the operations of the tourism sector
- **Ground transportation:** The tourism transportation sub-sector includes i) car rental operators; ii) contract carriage operators (e.g. tour companies/destination management companies, transport associations such as JUTA, JCAL and MAXI) and iii) independent operators
- **Accommodation:** The Jamaican accommodation sub-sector is made up of hotels, resort cottages/villas, guesthouses, and apartments. The island's tourism sector is centred around six resort destination areas: Montego Bay (9 307 rooms), Ocho Rios (8 202 rooms), Negril (7 574 rooms), Kingston (2 347 rooms), the South Coast (1 369 rooms) and Port Antonio (995 rooms)
- **Food and Beverage:** Food and beverage facilities, whether incorporated within tourism accommodations or "stand-alone"
- **Attractions:** The attractions sub-sector includes natural or man-made horticultural, cultural, historical, equestrian, aquatic, aerial, eco-tourism, recreational and environmental facilities for tourists. Many of these attractions are either informal or community-based
- **In-Bond Shopping:** In-bond shops, located within airports, hotels and in modern shopping centres in the resort areas, enable tourists to access duty-free shopping; they carry a wide range of imported luxury goods and souvenir items
- **Craft Industry:** The structure of the craft sub-sector in Jamaica is largely informal
- **Local Travel Trade:** The local travel trade sub-sector of the industry consists of 174 registered travel agencies with 46 currently in operation. Informal operations exist however there is need for data on the extent of their impact on the sector.

Tourism linkages

Important linkages between tourism and the wider Jamaican economy include:

- **Agriculture:** There are major linkages between agriculture and tourism derived from the activities of domestic agriculture, in particular fruits and vegetables. The accommodation sub-sector is the main user of agricultural inputs, with the main method of procurement through large distributors or small contractors, which in turn source agricultural produce from farmers
- **Manufacturing:** Within the manufacturing industry, the food and agro-processing, clothing, textiles and apparel, furniture and chemicals, and the cosmetic and pharmaceutical sub-sectors are most likely to have linkages with the tourist sector, as they supply products that serve as tourism inputs in the operation of tourist entities (e.g. furniture) or the direct consumption of tourists (e.g. apparel)
- **Construction:** The linkage between construction and the tourism sector is mainly reflected in the accommodation sub-sector with large investments in new hotel developments. Rapid hotel expansion has also created a demand for housing units, in proximity to resort areas to cater to workers in the sector
- **Public Utilities and Infrastructure:** Public utilities and infrastructure including electricity, communications, transport, and water are integral to the functioning of the tourism sector
- **Services:** The services sector of the Jamaican economy is diverse and touches on other sectors such as hospitality and tourism, entertainment, culture, education, finance and other services. The tourism sector is an end-user of numerous services including financial and real estate services, professional services, health care, and another commercial, domestic and personal services
- **Entertainment:** The entertainment sub-sector is one of the more vibrant within tourism, providing employment and business opportunities for thousands of Jamaicans and is considered a major generator of income and a source of growth.

Given the economic factors: size, structure and diversity of the tourism sector, as well as its linkages with the wider Jamaican economy, the COVID-19 pandemic had far-reaching impacts, such as:

- Travel restrictions, and cessation of airline flights and cruise services, directly affected visitor arrivals
- Restrictions of movement under the *Disaster Risk Management Act 2020* and health and safety protocols meant curtailing of public gatherings, entertainment events, the opening of attractions and other activities
- Demand for ground transportation declined sharply; operations of tourism-related businesses including restaurants, shopping, craft vending and other services – both large and small – were reduced leading to layoff of workers and loss of income.

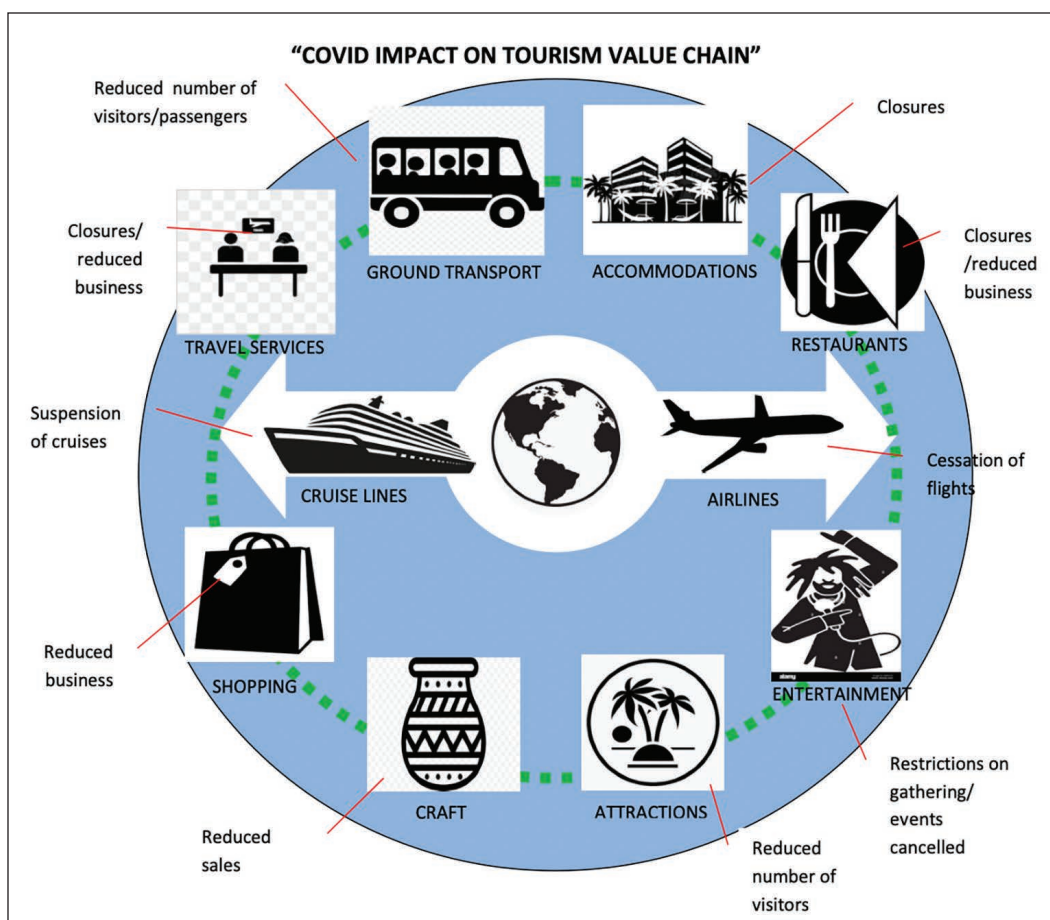


Figure 6: COVID-19 Impacts on the Tourism Sector

Overall, the result was a significant downturn in the sector, requiring strong counter-measures by the GOJ and tourism operators. See Figure 6.

IMPACTS

Visitor arrivals

Before the pandemic, visitor arrivals had grown steadily for over a decade, peaking in 2018; most of this growth was in stopover arrivals, which averaged 7.1 per cent per annum between 2016 and 2019. In 2019 there was a 2.0 per cent dip in total arrivals, influenced by a 15.9 per cent falloff in cruise visitors. Visitor arrivals plummeted by almost 70.0 per cent as a direct result of the COVID 19 pandemic. This occurred as a result of the closure of the Jamaican border, and travel restrictions in all major source markets, with the resultant reduced aircraft movement and the cessation of cruise shipping.

Table 4: Tourism Performance Indicators 2016–2021

Indicators	2016	2017	2018	2019	2020 ^p	2021 ^r	% Change 2019/2018	% Change 2020/2019	% Change 2021/2020
Foreign Nationals	2 020 381	2 196 301	2 298 162	2 483 169	798 290	1 332 574	8.1	-67.9	66.9
Non-Resident Jamaicans	161 603	156 614	174 570	197 751	82 114	131 825	13.3	-58.5	60.5
Stopover Arrivals	2 181 684	2 352 915	2 472 727	2 680 920	880 404	1 199 502	8.4	-67.2	36.2
Cruise Passengers	1 655 565	1 923 274	1 845 873	1 552 346	449 271	419 461	-15.9	-71.1	-6.6
Total Visitor Arrivals	3 837 249	4 276 189	4 318 600	4 234 150	1 329 675	1 618 962	-2.0	-68.6	21.8
Average Length of Stay (Nights) ^a	8.8	8.4	8.2	8	10.5	9.1	-2.9	27.9	-10.6
Total Foreign Exchange Earnings (US\$M)	2 607.7	3010.3	3 305.5	3 645.0	1362.4	1928.5	10.2	-62.6	41.6
Stopover Foreign Exchange Earnings (US\$M)	2 457.9	2 830.2	3 121.2	3 482.6	1 316.9	1 886.5	10.3	-62.2	43.3
Cruise Passenger Foreign Exchange Earnings (US\$M)	149.8	180.1	184.3	162.4	45.5	42.0	-11.9	-71.8	-7.7

p—preliminary

r—revised

a—average Length of Stay for Foreign Nationals

Discrepancies due to rounding

Source: PIOJ ESSJ 2020 and Jamaica Tourist Board 2021/ Ministry of Tourism

In 2020, some 1 329 675 persons visited Jamaica, compared with 4 234 150 in 2019. Stopover arrivals fell by 67.2 per cent from 2 680 920 to 880 404 persons while cruise passengers fell by 71.1 per cent from 1 552 346 to 449 271 persons. In 2021, the number of stopover arrivals increased by 66.3 per cent to 1 464 399, as the sector recovered from the severe restrictions imposed during 2020 at the height of the pandemic (Table 2). See Table 4.

Jamaica, like other Caribbean destinations, is highly dependent on three major markets – the United States of America, Canada and Europe. As Figure 7 shows, significantly more tourists arrive from the United States than from Canada and Europe combined. In 2020 for example, almost three-quarters (72.4 per cent) of visitors were from the US. See Figure 7.

Restrictions imposed in the United States, Canada and Europe to contain the pandemic, combined with the Jamaican border closures, had the effect of reducing both stopover and cruise passenger arrivals from these and other markets. As

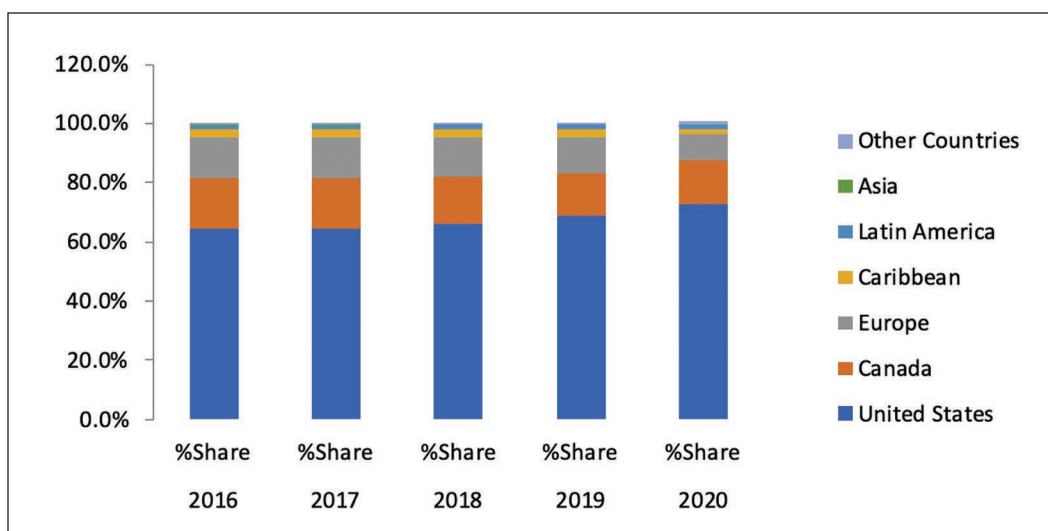


Figure 7: Visitor Arrivals by Source Market Share 2016–2020
Source: ESSJ, 2020.

Table 5 shows, the number of arrivals from all markets decreased dramatically in 2020 but recovered significantly from the main source markets in 2021.

Table 5: Stopover Arrivals to Jamaica by Source Market 2016–2021

Countries	2016	2017	2018	2019	2020	2021	% Change 2020/2019	% Change 2021/2020
United States	1 406 058	1 509 963	1 628 402	1 838 904	637 505	1 278 675	-65.3	100.6
Canada	372 157	405 174	399 969	395 561	132 014	67 184	-66.6	-49.1
Europe	294 709	325 804	328 369	320 640	78 225	86 749	-75.6	10.9
Caribbean	65 592	63 944	67 495	71 816	15 685	21 409	-78.2	36.5
Latin America	27 726	32 224	33 922	38 885	13 827	7 242	-64.4	-47.6
Asia	8 949	9 292	7 977	8 653	1 554	1 711	-82.0	10.1
Other Countries	6 513	6 514	6 593	6 461	1 594	1 425	-75.3	-10.6
TOTAL	2 181 704	2 352 915	2 472 727	2 680 920	880 404	1 464 399	-67.2	66.3

Source: ESSJ 2020 and Jamaica Tourist Board

Tourist expenditure

The pandemic also impacted foreign exchange earnings which declined from US \$3.6 billion in 2019 to US\$ 1.3 billion in 2020, a reduction of 65.5 per cent. This decline was attributed to the fall-off in stopover and cruise visitors (see Table 4 and Table 5). The reduction in stopover expenditure was 65.5 per cent, from US\$ 3.5 billion to US\$ 1.2

billion, while cruise passenger expenditure fell 71.8 per cent, from US\$ 161.3 million to US\$ 45.5 million. Total foreign exchange earnings, however, rebounded in 2021, increasing by 66.8 per cent (see Table 4).

The MOT projected the impact of fallout of retained visitor expenditure from stop-over arrivals on accommodations, attractions, entertainment, food, transportation, shopping, etc. at \$154.4 billion.

Government revenue

Tourism accounts for about 10.0 per cent of government revenue. The decreased number of tourism arrivals, therefore, had a significant impact. As shown in Table 6, government revenue losses were over \$46 billion. The government also suffered indirect revenue losses based on tourism linkages with other sectors. For example, Special Consumption Tax (SCT) was impacted partially by a decline in alcohol production for hotel and entertainment activities and fell by 22.3 per cent.²

Table 6: COVID-19 Impact on Government Revenue April 2020 to March 2021

Sources of government revenue (J\$B)	Anticipated direct government revenue (J\$B)	Actual COVID-19 government revenue (J\$B)	Loss in direct government revenue (J\$B)
TEF collections from Stop-over arrivals	6.90	1.08	5.80
Airport charges and taxes	34.20	5.36	28.80
GCT	6.23	.96	5.27
GART (Room tax)	3.19	.49	2.70
Cruise tax	3.19	—	3.63
TOTAL	54.17	7.91	46.76

Source: Ministry of Tourism: Economic Impact of the COVID-19 Pandemic of the Tourism Sector.

Employment

Data from the COVID-19 Economic Recovery Task Force, June 30, 2020, indicated that employment in the Accommodation and Food Service Activities industry declined by 17 233 persons, directly affected by restrictions on global travel and border closures. These measures affected visitor arrivals from major source markets and consequently earnings from tourism. This included a 15.0 percent (9 900) decline in female employment to 56 867; meanwhile male employment declined by 18.0 per cent (7 333) to 33 933. Employment in the Accommodations and Food Services Activities industry group declined by 19 per cent from 108 033 to 90 800 persons. By April 2020, about

2. Travel Source: PIOJ, Economic and Social Survey of Jamaica (ESSJ) 2020.

90.0 per cent of persons employed in the tourist accommodations sector were sent home. The indirect impact was even greater in tourism-dependent sectors like ground transportation, where up to 97.0 per cent were displaced.

The impact of job losses was particularly severe for workers in the informal sector, including ground transportation and craft vendors.

With borders opening up to international travel, according to the Jamaica Hotel and Tourism Association (JHTA), as of December 2020,³ some 30.0 per cent of the tourism workers were re-engaged on a full-time basis, while another 10–20 per cent were working part-time, at reduced hours or reduced wages. There were also reports that certain lower-paid categories of workers in the tourism sector sought alternative employment, self-employment, or left the labour force after being laid off, and were not available for re-employment after the sector started to recover. This contributed to a shortage of certain categories of labour in the tourism sector in the aftermath of the re-opening of the sector in 2021.⁴

INITIATIVES IN RESPONSE TO THE COVID-19 PANDEMIC

In the light of the pandemic and the closure of Jamaica's border to international travel, the MOT revised its targets for 2020 as follows:

- Stopover arrivals: 870 032 (67.5 per cent decrease relative to 2019)
- Foreign exchange earnings from stopover arrivals: US\$ 1.28 billion (64.8 per cent reduction relative to 2019).

The MOT implemented strategies, policies and programmes in response to the pandemic, which included measures designed to:

- Provide Job and Income protection and training for tourism workers
- Support the survival of tourism businesses
- Facilitate the tourism sector's short-term recovery
- Promote the tourism sector's medium-term sustainability and resilience.

Job and income protection and training of tourism workers

- Increase in the capacity of the MOT's online training programme to support furloughed tourism workers. The Jamaica Centre for Tourism Innovation and the Tourism Enhancement Fund facilitated the training and certification of 5 000 tourism workers in various areas

3. Source: Ministry of Tourism.

4. From interviews with Ministry of Labour and Social Security (MLSS).

- Under the GOJ's \$10-billion COVID-19 Allocation of Resources for Employees (CARE) Programme—BEST Cash is one of eight components of the CARE Programme, which was aimed at cushioning the economic impact of the COVID-19 pandemic by providing financial assistance to workers and businesses adversely affected in the tourism sector
- The MOT implemented a ground transportation loan program to soften the negative socioeconomic impacts – this would have assisted with meeting loan obligations and prevent repossession of their vehicles. Financial assistance was also extended to craft vendors.

Support to survival of tourism businesses

- Developed and implemented the Tourism Health and Safety protocols for the re-opening of the sector – an initiative of the Tourism Product Development Company (TPDCO) in collaboration with the MOHW. The tourism protocols were the enhanced health hygiene and safety standards to be adhered to by tourists, tourism workers and tourism entities related to accommodation or ground transportation services
- Established a system for COVID-19 compliance in tourism enterprises. The TPDCO established a certification system that includes the inspection of tourism entities to ensure that they implemented the relevant protocols and infrastructural changes to safely operate in the sector. Entities that met the criteria were certified and allowed to open for business
- Established tourism Resilient Corridors. Part of the government's risk management strategy for the COVID-19 pandemic was the establishment of these COVID-19-compliant safe zones ("bubbles") subject to the enhanced health and safety standards directed by the MOHW, as set out in the COVID-19 Health and Safety Protocols. This reduced the likelihood of transmission of the virus between visitors and residents while the country's borders were re-opened to international travel. This was implemented in two major resort areas which receive the majority of international tourists – the North Coast and the South Coast
- Provision of COVID-19 Resilient Packages. Small and Medium Tourism Enterprises (SMTEs) received COVID-19 packages consisting of thermometers, sanitizer dispensers and waste disposal units facilitated by the Tourism Enhancement Fund (TEF). The TEF also utilized local suppliers to manufacture 20 000 masks for distribution to tourism workers, including ground transportation workers and craft vendors.

Facilitating the tourism sector's short-term recovery

A five-point recovery plan for the tourism sector featured:

- Robust health and security protocols
- Training all sectors to manage protocols and new behavioural patterns
- COVID security infrastructure (PPEs, masks, infra-red machines, etc.)
- Communication with local and international markets about re-opening
- One of the major initiatives spearheaded by the MOT was the Tourism Recovery Task Force established by the Minister of Tourism in collaboration with representatives from various sub-sectors. The role of the task force was to develop a recovery plan to cushion the impacts of the pandemic and propose measures that would help the sector to recover. A multi-phased approach was developed
- Domestic tourism marketing: Increase in the number of Jamaicans vacationing in Jamaica through the Rediscover Jamaica Campaign
- Increased opportunities for linkages and networking between Small and Medium Tourism Enterprises (SMTEs) to compensate for shortfalls in traditional sources of tourism demand.

Promoting the tourism sector's medium-term sustainability and resilience

- Increase in the percentage of tourism enterprises that have plans in place (e.g. disaster plans and communication/business continuity/pandemic response and recovery plans)
- Conduct risk assessment and Business Continuity planning for the sector: Several businesses did not have a business continuity plan. The MOT completed a business continuity plan template and a training of trainers program was completed to support businesses in developing their plan for both health and climate crises. A risk register is also being developed for the sector to support resilience building
- Strengthen monitoring and evaluation: Significant work is ongoing to strengthen monitoring and evaluation including increased staffing and capacity development/technical assistance for data management as well as on various policies, strategies and frameworks to guide the recovery of the sector, including the Blue Ocean Strategy; a Destination Assurance Strategy and Framework; the Multi-Hazard Contingency Planning Programme; and the Tourism Linkages Network (TLN).

SUCCESSSES

Several government initiatives undertaken in response to the COVID-19 crisis were considered successful:

- The income support programmes impacted some of the most vulnerable groups. For example craft vendors received direct cash benefits through the BEST Cash program
- The TPDCO-administered programme to certify establishments compliant with the COVID-19 protocols was effective. The Tourism Protocols and the Resilient Corridors were fairly successful in minimizing the spread of COVID-19 between tourists and nationals. The resilient corridors, which encompasses the majority of the island's tourism regions, provided the opportunity for visitors to enjoy more of the country's unique offerings, as many COVID-19-compliant attractions were accessible within the designated zones
- The travel authorization platform, implemented by the MOT in collaboration with the MOHW, was useful in facilitating the health pre-screening of travellers
- As a result of the Re-Discover Jamaica Campaign, focused on boosting local tourism, many hotels reported increased occupancy rates
- The MOT, despite limited resources, adapted fairly quickly to the pandemic response and worked with partners nationally and internationally, utilizing digital tools to facilitate communications
- COVID-19 was a catalyst to develop unique ways to provide training to various businesses. Some examples included video trainings, where the target audience could access the training on their own time
- Many tourism entities – mainly the larger ones – adopted web-based and app-based platforms to facilitate check-ins, which limited direct contact with the front desk staff. Most businesses also had virtual menus which would limit the spread of virus compared with paper-based menus.

CHALLENGES

The COVID-19 pandemic and the responses to the impact of the emergency on tourism stakeholders revealed certain emerging issues and challenges, which will need to be addressed in recovery planning. These include:

- The need for additional support to suppliers of tourism inputs. Increased support was needed for stakeholders who have linkages with the tourism sector. For example, many farmers needed to dispose of surplus fresh produce due to reduced demand resulting from decreased tourist arrivals and lower occupancy rates
- Tourism SMEs, informal entities and informal and seasonal workers face particular problems that require targeted responses

- There is need to strengthen the monitoring framework. The MOT ensures that project activities and outputs are aligned to the SDGs, and quarterly reports are done to support monitoring. However, there is a need for strengthened data collection and management systems for more effective monitoring. A process of implementing more robust monitoring frameworks is ongoing. For example, a Monitoring and Evaluation Officer was recently assigned to the ministry's Policy and Monitoring Branch, and Terms of Reference are being developed for a data governance framework. Under SDG 12 – 'Ensure sustainable consumption and production patterns' – the MOT is working with UN-WTO to develop a measurement for sustainable tourism (MST) which will guide the ministry to achieving SDG 12.

LESSONS LEARNED

The COVID-19 pandemic and the measures to address its impacts brought to the fore several issues that should be taken into consideration in assessing the impact and designing strategies for recovery and improving preparedness and resiliency in the face of future emergencies.

This first lesson is the critical role of the tourism sector in the Jamaican economy. On average, tourism accounts directly for 8.0 per cent to 10 per cent of GDP and contributes the greatest share of foreign exchange earnings. The virtual collapse of the sector in 2020 induced a tourism-led economic decline. The decrease in tourism activity was forecasted to lead to a contraction of the Jamaican economy by 12.0 per cent to 14.0 per cent in the June 2020 quarter.⁵ It follows that the recovery of land-based and cruise tourism, if sustainably managed, would contribute significantly to Jamaica's economic recovery.

The dramatic nature of the contraction of the tourism sector and its impacts also highlights the structural characteristics of both land-based and cruise components of the sector, in particular its dependence on a small group of overseas source markets. Its linkages with the domestic economy, while sub-optimal, cover a wide range of goods and services. There is room for diversification of source markets for the tourism product and the domestic supply chain. While the tourism market should be fully tapped to maximize linkages for example, attention should also be paid to increasing and serving domestic demand.

Rebuilding the lost output of the tourism sector to pre-pandemic levels and continuing the growth of the sector along its prior path in a sustainable way will require additional and innovative strategies. The crisis however provides an opportunity to increase the contribution of tourism to attain the 17 SDGs. Efforts of other international

5. COVID 19 Economic Recovery Task Force Final Report.

commitments could also be accelerated, such as the Small Island Developing States (SIDS) agendas, including the Accelerated Modalities of Action (SAMOA) Pathway.

Tourism is a key sector that contributes directly or indirectly to all goals, particularly SDGs 8 (decent work and economic growth), SDGs 12, 13 (sustainable consumption and production, climate action); 14 and 15 (life below water and on land). The mitigation measures currently being implemented for the tourism sector in the context of the pandemic are an opportunity to improve environmental and social sustainability.

It should be noted that on a global scale, tourism contributes approximately 5.0 per cent of global greenhouse gas emissions (GHG), with transport accounting for almost three quarters, followed by accommodation (one-fifth). This statistic underscores the importance of tourism's role in sustainable development. If measures such as those implied by the Sustainable Development Agenda are not implemented, and a “business-as-usual” scenario prevails instead, the sector could potentially generate substantial environmental damage. However, taking the necessary measures to “green” tourism could considerably reduce its potential negative impacts. A comparison of the environmental impacts of tourism in a proactive versus a “business as usual” scenario is illustrated in Figure 8 (OECD, 2018).

Tourism relies on natural ecosystems for its functioning (water, energy, agriculture and the attractiveness of the landscape), but also contributes to their depletion. Therefore, it is greatly affected by climate change and natural disasters. Measures to alleviate pressure on water, improve energy efficiency, protect biodiversity, optimize relations with the agriculture sector and build resilience to disasters are therefore important components of a sustainability strategy as the tourism sector continues its steady growth. Some tourism entities – mainly large hotels – are increasingly incorporating “green” strategies such as energy and water conservation and coral and mangrove restoration into their business models.

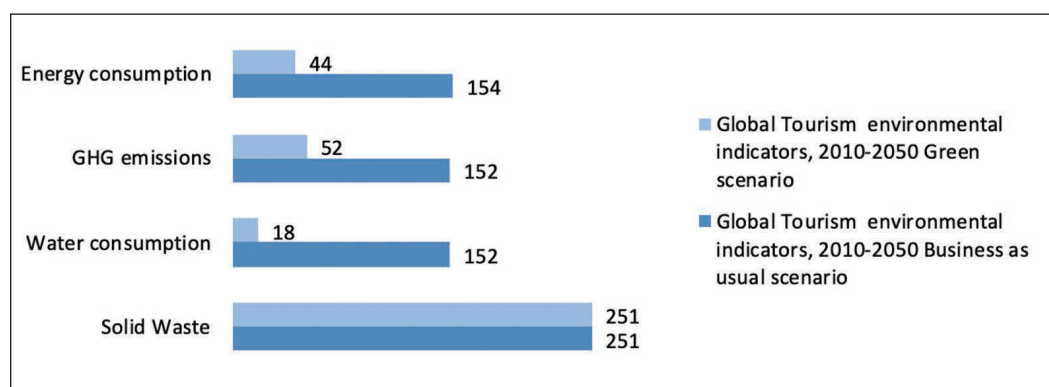


Figure 8: *Global Tourism Environmental Indicators 2010–2050 Green vs. “Business As Usual”*
Source: OECD (2018) “Analyzing Megatrends to better shape the future of Tourism”, OECD Tourism Papers, No. 2018/02, OECD Publishing, Paris.

Experience gained in response to COVID-19 could prove useful in meeting the new disaster risk management challenges that are expected to arise. For example, the progress made in promoting digitalization, the coordination of responses among various agencies and communication with stakeholders can be usefully applied in other disaster emergencies.

The vulnerabilities of lower-paid and seasonal workers, women, informal sector workers and small tourism enterprises were also evident, highlighting the need for inclusive strategies. Larger properties were more financially capable of implementing contactless measures such as virtual check-ins and menus compared with smaller enterprises and were more likely to adapt to new requirements for doing business in a pandemic. The need for social insurance and social protection for the most vulnerable categories of workers was also highlighted. In this regard, the launch of a pension scheme for tourism workers in 2019 was timely.

The pandemic also provides an opportunity to examine more integrated strategies for the long-term sustainable development of the tourism sector, such as regional cooperation at the level of the public and private sectors.

CONCLUSIONS

The COVID-19 pandemic had a dramatic impact on national development targets for the tourism sector. The targets for key outcome indicators – foreign exchange earnings, visitor arrivals and employment were significantly disrupted. The closure of Jamaica's border to international travel prompted the MOT to revise its 2020 targets. Table 5 shows that the actual outturn for stopover arrivals and foreign exchange earnings from tourism declined by 67.2 per cent and 65.5 per cent, respectively.

Several response programmes implemented to cushion the impact of the COVID-19 pandemic were effective in reducing the impact on workers, businesses and the wider economy and facilitating a more sustainable recovery, which is still ongoing. These included measures aimed at protecting jobs and incomes of workers and providing training; supporting the survival of tourism businesses under pandemic conditions with appropriate health and safety protocols; facilitating the tourism sector's short-term recovery, and promoting the sector's longer-term sustainability and resilience.

Although programmes to protect jobs and incomes benefited many tourism workers, SMEs, women, informal entities, and informal and seasonal workers face particular problems that will need to be addressed comprehensively in the recovery programme.

There is a need to strengthen the monitoring framework for SDGs in the tourism sector, for example, through strengthened data collection and management systems for a more robust and effective monitoring programme.

RECOMMENDATIONS

The COVID-19 Economic Recovery Task Force put forward some recommendations for the recovery of the land-based and cruise components of the Jamaican tourism sector that are critical. These include strategies to increase tourism's contribution to GDP such as: achieving greater retention of the tourism dollar through deeper linkages; increasing tourist arrivals beyond pre-COVID levels; increasing room stock; and investing in infrastructure that preserves natural habitats. The highlights of the key recommendations include:

- Increasing the capacity of the MOT
- Updating the legal and regulatory framework for the tourism sector (e.g., Jamaica Tourist Board Act 1955, River Rafting Act 1970, etc.)
- Expanding functions and objectives of the Jamaica Tourist Board
- Increasing tourism linkages
- Promoting greater inclusiveness of local entertainment
- Adapting TPDCO public hygiene protocols for the cruise destinations
- Addressing tourist harassment
- Investment in infrastructure
- Enhancing the walk-off experience at cruise ports
- Using big data to assess progress.

The Tourism Sector COVID-19 Recovery Plan features:

- A Destination Assurance Strategy and Framework to improve the competitiveness of the destination
- Deliberate resilience planning. During the pandemic, the MOT developed a Blue Ocean Strategy that speaks to increasing competitiveness with the natural resources that Jamaica has – this strategy will guide recovery. Key elements include developing human capital, economic impact and attracting investments
- Emphasis on inclusiveness and sustainability
- Partnerships are a key element of the tourism recovery plan.

These recommendations will strengthen the tourism sector and enhance the competitiveness of the destination in keeping with the goals of the national development plan. They should be supplemented by comprehensive measures aimed at meeting relevant SDGs. Other strategic options include:

Job, income protection and training of workers

- Introduce measures to enable firms to retain workforce during periods of downturn, without resorting to termination:
- Payroll support programmes, for example, the COVID-19 Allocation of Resources for Employees (CARE) programme and the COVID-19 tourism grants provided vital temporary relief
- A review of the *Employment Termination and Redundancy Payments* legislation to allow a longer period before redundancy payments become mandatory should be included. Tourism MSMEs in particular could benefit
- Continue to develop the LMIS. The LMIS may be used to facilitate the transfer of tourism workers to other industries requiring additional support staff in the context of the pandemic response. However, the LMIS may also be used to source labour for the tourism sector. In the aftermath of COVID-19, the tourism sector faced labour shortages as many displaced workers re-deployed to other jobs, the informal sector, or withdrew from the labour market
- The COVID-19 pandemic highlighted the vulnerability of part-time, temporary, casual, seasonal, self-employed and independent workers in the tourism sector. Recovery plans must be based on the principle of decent work, including regulation of labour and health rights of workers in tourism-related occupations
- Measures should be adopted to support the formalization of informal workers in tourism, with a special focus on the most vulnerable ones
- As women account for most of the tourism workforce and are especially affected by the closures of tourism entities, measures to address this group with specific support should be introduced
- Temporary income or unemployment benefits for self-employed and cash transfers to workers in tourism introduced by the government is a step in this direction, as is the Tourism Workers' Pension Scheme
- To improve job protection and welfare in the medium term, as well as the implementation of ILO (2017) guidelines on decent work and socially responsible tourism, governments should encourage the creation of unions within the tourism sector to better protect workers' rights. Although Jamaican legislation allows for this, many large companies in the tourism sector are not unionized
- Tourism agencies should continue to organize training to promote information technology (IT) and digital skills, entrepreneurship, and digital marketing to better prepare workers for the digitalization of the sector. Some (international) organizations have developed (free) online training materials for businesses and workers, such as the UNWTO Tourism Academy.

Support business survival (particularly MSMEs) along the tourism value chain

- Government initiatives such as COVID-19 Relief Packages, Business Employee Support and Transfer of Cash Program, the COVID-19 Tourism Grant, and the moratorium on the payment of licenses and fees by entities in the tourism sector benefited SMEs. This support could be continued in the post-COVID recovery period, for example, through facilities administered by the TEF
- Increased support should be channelled to suppliers to the tourism sector. For example, several farmers were affected by reduced demand resulting from decreased tourism arrivals and lower occupancy rates. Measures to strengthen linkages between domestic agriculture and the tourism sector should be maintained and strengthened
- Assistance should be provided to tourism MSMEs to improve their digital skills to facilitate interaction with potential customers and take advantage of e-commerce, for example, through booking platforms and social media). However, the adoption of these technologies will depend on the capacity and stability of telecommunications infrastructure and services, especially in rural areas. Effective implementation may require collaboration between the MOT and the ministry with responsibility for telecommunications infrastructure. The MOT, through its agencies like TEF, TPDCO and JCTI will need to play a leading role, building on some of the training and capacity-building initiatives applied in response to the pandemic.

Facilitating the sector's short-term recovery

- Continue preventative measures to minimize the spread of the virus or potential subsequent waves of infection
- Extend low-cost loans to tourism entities (especially SMEs) to upgrade facilities/equipment to meet health standards to increase attractiveness to visitors
- Explore the use of IT such as big data analysis to monitor visitor preference for activities, attractions, food and other areas of consumption to stimulate spending
- Increase promotion of domestic tourism to build resilience to shocks. Options include the provision of vouchers or discounts to targeted groups such as government workers, lower-income families, or the elderly to make domestic tourism more affordable. The promotion of domestic tourism has a dual function of reactivating the economy while increasing access to leisure for the wider population and is already used in many hotels attracting locals at discounted rates.

Special marketing campaigns to attract new visitors

- International marketing strategies should target those groups likely to travel first, for example luxury and business travellers, who can more easily adopt social-distancing; Generation Z. Efforts to diversify source markets, to reduce the dependency on traditional markets, should also continue
- Increased awareness of sustainability issues in ecotourism strategy could be boosted by the need for social-distancing. This may be related, for example, to carrying capacity.

Tourism clusters

- Clusters are a geographic concentration of interconnected businesses, suppliers and other institutions with strategic agenda for business upgrading and product development (e.g. based on marketing themes such as culture, environment, and heritage). Using short, medium and long-term strategies, clusters can respond quickly to changes in customer behaviour by adapting sales strategies, facilitating product and process innovation, coordinating production, purchasing and financing, adapting to changes in the local and global supply chains, defining and organizing human resources, reacting to competitors, organising online and other distribution channels, and promoting global presence. The Jamaican tourism industry is traditionally “clustered” around certain resort zones in the “sea, sun and sand” model. However, the concept can be applied to a more diversified tourism product that targets other market segments (e.g., heritage, eco-tourism, culinary and craft). This approach is particularly relevant for community based and MSME tourism.⁶

Promotion of the sector’s medium-term sustainability and resilience

- Rebuilding the tourism sector to pre-COVID-19 levels and continuing the growth of the industry along its prior path in a sustainable manner will require additional and innovative strategies. The crisis however provides an opportunity to increase the contribution of tourism to the 17 SDGs. Efforts through other international commitments could also be accelerated, such as the Small Island Developing States (SIDS) agendas, including the Accelerated Modalities of Action (SAMOA) Pathway, especially in terms of tourism’s contribution to the sustainable environment

6. Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on Cluster Development Colombia, <https://www.cluster-development.com/>.

- Tourism is a key sector that contributes directly or indirectly to all goals, particularly SDGs 8 (decent work and economic growth), 13 (climate action), 14 and 15 (life below water and on land). The mitigation measures currently being implemented for the tourism sector in the context of the pandemic could be used to improve environmental and social sustainability
- Strengthen disaster risk reduction measures:
 - ◁ Design zoning plans in collaboration with the National Environment and Planning Agency (NEPA) and local government authorities that include evacuation and other safety criteria for local inhabitants and tourists
 - ◁ The TPDCO as the regulatory agency should maintain and strengthen its monitoring and enforcement efforts concerning building codes. These should consider local threats and environmental conditions to identify adequate construction methods and building materials. This is especially applicable to informal tourism entities, but multi-room high-rise accommodation should not be overlooked
 - ◁ In places where infrastructure has already been developed, retrofit hotel infrastructure to withstand the effects of the most common natural threats
 - ◁ Protective infrastructure, such as dykes and seawalls, should be accompanied by green responses, such as mangrove restoration.
- Decentralize energy provision by relying on local renewable sources. Besides providing redundancy with national systems, it would promote a transition to a sustainable grid and reduce sectoral GHG emissions
- Promote group or activity insurance schemes that attract more MSMEs and ease insurance conditions
- Strengthen the monitoring framework including data collection and management systems for more effective monitoring of Sustainable Development Goals. Under SDG 12 – ‘Ensure sustainable consumption and production patterns’ – the MOT is working with UN-WTO to develop a measurement for sustainable tourism (MST), which will guide the ministry to achieving SDG 12.

Regional cooperation

- Governments in the region should collaborate more to keep transport networks open as much as possible, paying special attention to transport operators (cruise, airlines and logistics operators) for facilitating their transit and interchange of crews. Regional bubbles would also boost intra-regional tourism and promote trust between visitors and destinations such as those established in the Caribbean that could be replicated in other sub-regions.

Some initiatives have been taken in sub-regions, mainly in the Caribbean Community (CARICOM), to foster cooperation and coordination to confront the pandemic and its economic fallout. Another proposal is the issuance of Certificates of Operation for tourism businesses that comply with these protocols (CARICOM Today, 2020b).

Another initiative is the establishment of the COVID-19 Caribbean Tourism Task Force, comprising the Caribbean Public Health Agency (CARPHA), Caribbean Hotel and Travel Association (CHTA), Caribbean Tourism Organization (CTO) and the Global Tourism Resilience and Crisis Management Centre (GTRCMC).

The following actions could be coordinated at the sub-regional level

- Create multi-country and multi-stakeholder (related to tourism and regional and international public health organizations such as PAHO and CARPHA) crisis coordination teams to increase information exchange on travel-related health and other measures to limit the spread of the virus
- Develop joint guidelines and protocols to restore travel and tourism, including measures such as social-distancing and hygiene restrictions, rules within airports and onboard aircraft, as well as ports. International tourism organizations, such as UNWTO and WTTC, are guiding these efforts
- Enhance bilateral or sub-regional agreements to accept travellers from certain countries, such as the regional bubbles in the Caribbean and others being discussed in the European Union. These agreements could lead to more effective responses to future pandemics or other health emergencies
- Promote cooperation among national tourism organizations and relevant stakeholders in health, transport and immigration, with the aim to better coordinate measures to mitigate the impact of COVID-19
- Foster the exchange of good practices among countries in the region on the responses to the crisis, including connectivity, coordination, national relief efforts and measures to support the tourism sector
- Coordinate policies and measures to increase confidence among domestic and international travellers to the region, including the development of clear standards and guidelines for a safer and healthier work environment to protect workers in tourism-related industries, destinations and establishments
- The CTO recommends countries promote the region as a destination for health and wellness. To support the sector's recovery, the CHTA has created a webpage to share experiences and promote tools and resources. The Caribbean should strategically brand and market itself as a region that has been able to better contain the spread of the virus to capture a share of "pent demand" in the sector from more affected regions.

Create and implement a post-COVID-19 Crisis Recovery Plan safeguarding public health and social wellbeing, including:

- Enhance national and regional tourism capabilities, engage with industry stakeholders to increase business and consumer confidence, explore creative and innovative solutions to stimulate the tourism sector by using digital technologies, and coordinate marketing efforts and joint tourism promotion programmes. These should be aimed at promoting the Caribbean sub-region as a single tourism destination and promoting “multi-destination” travel
- Assess the social, economic and environmental impacts of cruise ship tourism, and define regional standards moving forward
- Strengthen regional integration and cooperation among governments, sub-regional, regional and international organizations and industry stakeholders to improve the resilience of tourism, as well as promote sustainable and inclusive tourism in the aftermath of this crisis.⁷

OUTLOOK

Real Value Added (RVA) for the Hotels & Restaurants industry was projected to grow during 2021. This anticipated out-turn is based on an increase in the number of foreign nationals visiting from the island’s main source markets. Even though an expansion in RVA is expected, the island continues to be affected by the virus and the sector is not anticipated to return to pre-pandemic levels of visitor arrivals before 2023.

There were 1.5 million visitors in 2021, bringing in more than US\$2.0 billion in foreign exchange earnings. The MOT projects a total of 2.9 million visitors in 2022, an 85.2 per cent increase, made up of 1.4 million stopover arrivals – an increase of 20.4 per cent – and 1.5 million cruise passengers – an increase of 270.3 per cent. Foreign exchange earnings of US\$ 2.4 billion are projected. There is an optimistic projection of Jamaica’s visitor numbers of 3.2 million to 4.1 million by 2024, with cruise passengers accounting for 1.6 million and stopover arrivals accounting for 2.5 million and gross foreign exchange earnings of US\$3.3 billion to US\$4.7 billion. This assumes a definitive end to the pandemic crisis and a full recovery of stopover arrivals and a revival of the cruise industry.

7. Source: ECLAC – *International Trade Series N° 157 the impact of the COVID-19 pandemic on the tourism sector*).



SOCIAL PROTECTION

This section presents the main findings and recommendations from a comprehensive document review and analysis of the impact of the COVID-19 pandemic on social protection in Jamaica. It establishes the context of social protection in Jamaica, painting a picture of social protection before the pandemic, and highlighting some key challenges and results to be achieved towards effective social protection. The section also explores the impact of COVID-19 on social protection and details the response by the government of Jamaica (GOJ) and its partners.

The assessment highlights social protection as the key mechanism to address the impact of the pandemic on the most vulnerable and targeted sectors. Additionally, it discusses the opportunities that Jamaica can leverage to achieve Vision 2030 Jamaica's target to *Engender Effective Social Protection*.

CONTEXT

Vision 2030 Jamaica national development plan, the Medium-Term Socio-Economic Policy Framework (MTF) The Jamaica Social Protection Strategy (SPS) 2014, and the National Poverty Reduction Programme (NPRP) provide a strong policy and strategic context for social protection in Jamaica.

THE SOCIAL PROTECTION FLOOR “INCLUDES GUARANTEES OF:

- A. BASIC INCOME SECURITY, IN THE FORM OF VARIOUS SOCIAL TRANSFERS (IN CASH OR IN KIND), SUCH AS PENSIONS FOR THE ELDERLY AND PERSONS WITH DISABILITIES, CHILD BENEFITS, INCOME SUPPORT BENEFITS AND/OR EMPLOYMENT GUARANTEES AND SERVICES FOR THE UNEMPLOYED AND WORKING POOR.**
 - B. UNIVERSAL ACCESS TO ESSENTIAL AND AFFORDABLE SOCIAL SERVICES IN THE AREAS OF HEALTH, WATER AND SANITATION, EDUCATION, FOOD SECURITY, HOUSING, AND OTHERS DEFINED ACCORDING TO NATIONAL PRIORITIES”.**
-

Source: Social Protection Floor: For a Fair and Inclusive Globalization. Report of the Advisory Group chaired by Michelle Bachelet, convened by the ILO with the collaboration of the WHO.

Jamaica’s social protection system is regarded as one of the most developed in the Caribbean. The World Bank describes it as “well-established” and as a “critical contributor to government’s poverty reduction efforts”. The GOJ’s main conditional cash transfer (CCT) programme, the Programme of Advancement through Health and Education (PATH), was developed in the early 2000s and is one of the first CCTs globally. Other major social assistance programmes include the School Feeding Programme (SFP), which provides meals primarily to school-aged PATH beneficiaries; the National Health Fund and Jamaica Drug for the Elderly Programme both of which subsidize prescription drugs. There are also other smaller cash and in-kind transfer programmes such as the Poor Relief Programme which provides cash and in-kind transfers to the registered poor.

Jamaica’s social protection landscape also includes social insurance (the contributory National Insurance Scheme and the Public Pension Scheme); active labour market programmes such as the HEART/NSTA Trust National Training Agency, the leading training agency that provides skills training and certification, and welfare programmes that assist vulnerable groups.

The country has the supporting institutional arrangements and monitoring and evaluation frameworks to guide the implementation of the social protection system. The Ministry of Labour and Social Security (MLSS), which manages several key programmes, plays an important role in the administration and implementation of SPS. Other key entities that participate in social protection implementation include the Ministry of Local Government & Rural Development (MLGRD), the Ministry of Health and Wellness (MOHW) and the Ministry of Education, Youth and Information (MoEYI) and non-governmental organizations (NGOs). Additionally, in 2014, the

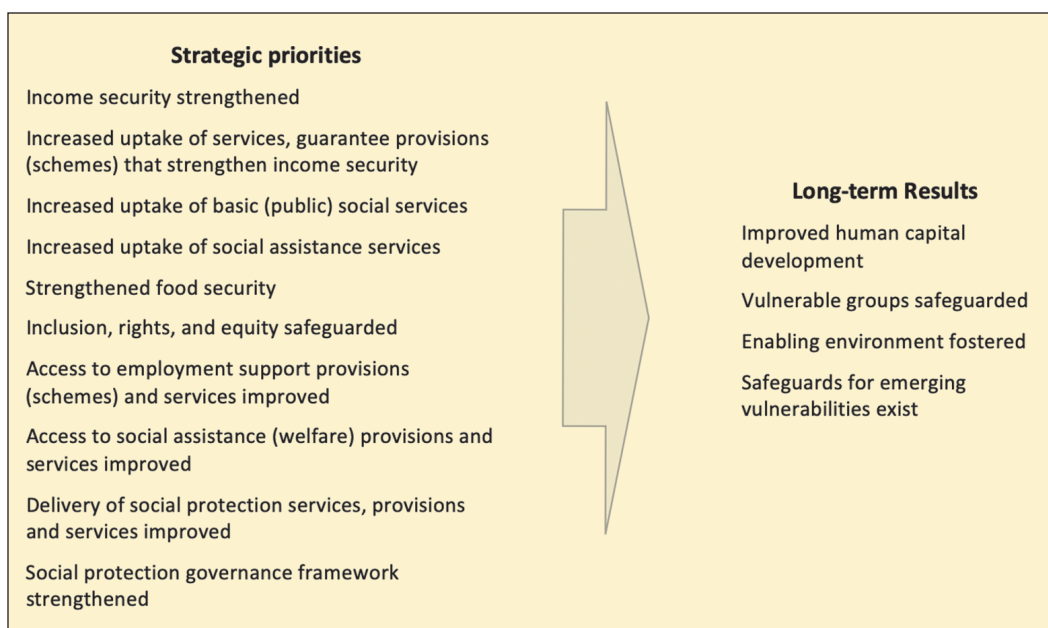


Figure 9: Strategic Priorities and Long-Term Results, Social Protection in Jamaica

Source: SPS M&E Framework

PIOJ convened the National Social Protection Committee (NSPC) as the institutional framework for the SPS (NSPC Annual Report 2019/2020). The NSPC provides policy advice and is a forum for networking and collaboration across programmes, projects and related sectors. See Figure 9.

Challenges to Social Protection

Jamaica's social protection system is not without challenges. There is low participation in social protection programmes by vulnerable groups, even when they are eligible to benefit. The World Bank estimates, for example, that a little over 300 000 working-age Jamaican adults who are either living in poverty or facing extreme poverty, are not benefiting from social protection benefits such as PATH and Poor Relief though they would be eligible (Table 7).

Table 7: Estimated Gaps in Coverage for Key Social Protection Provisions (Based on the 2017 JSLC).

	Not covered by PATH or Poor Relief		Not covered by PATH, Poor Relief, or NIS	
Population Groups	Poor	Extreme Poor	Poor	Extreme Poor
Working-age adults	247 790	66 800	—	—
Children	101 432	26 698	—	—
Elderly	—	—	27 954	8 070
Persons with disabilities	—	—	14 822	5 186

Source: World Bank Group, 2019.

There is also inadequate participation in social insurance programmes. Data from the Jamaica Survey of Living Conditions (JSLC) 2019 shows that there was an increase in the proportion of persons 18 years and older registered to the National Insurance Scheme (NIS); 62.8 per cent compared with 55.4 per cent in 2018. On the other hand, of the proportion of the population 18 years and older that indicated registration on the NIS, only 40.3 per cent were active contributors to the scheme (within the previous 12 months). The practice of self-employed persons for example, not contributing to the NIS, also limits expansion of the scheme.

The SPS highlights that the key challenges of poverty in Jamaica are “the persistence of poverty, especially in the rural areas, poor educational outcomes which lead to inadequate preparation of youth for employment; insufficient social security coverage against various risks; inadequate provisions for meeting the needs of low-income households for shelter and related infrastructure; lack of provisions for increasing equity in the society for disadvantaged and vulnerable groups; and insufficient institutional capacities, particularly in the public sector, to effectively deliver social protection interventions”.

Other challenges and gaps highlighted by progress reports, reviews and studies include:

- Insufficient funding and fiscal constraints
- Limited human resources and capacities including social workers, psychologists and nutritionists
- Growing demands for services amidst resource constraints
- Weaknesses in M&E systems and capacities
- Psychosocial challenges among beneficiaries and target groups affecting programme uptake
- Ineffective targeting results in duplication of benefits
- Insufficient collaboration and coordination among key stakeholders, including service providers
- Fragmentation and duplication of programmes
- Need for an adequate legal framework to protect provisions and define clear roles and responsibilities of social protection institutions; eliminate existing overlapping and duplication of functions and interventions and strengthen monitoring and evaluation (M&E) mechanisms.

Effective Social Protection Pre-COVID-19

Before the pandemic, the National Social Protection Committee (NSPC) focused on assessing gaps in the reach and scope of social protection provisions from both the supply (services) and demand (beneficiaries' needs) sides. The government also advanced work in strengthening the institutional framework to include formulation

of policy documents, revision of legislative frameworks in the areas of child protection, youth development, gender, and disabilities. The National Plan of Action for an Integrated Response to Children and Violence 2018–2023 was tabled, signalling the government’s commitment to the care and protection of Jamaica’s children. The GOJ also drafted three Codes of Practice to support the implementation of the Disabilities Act 2014 – employment, healthcare and education and training. They came into effect in February 2022.

The GOJ implemented several actions focused on the empowering youth through education and training; addressing gender inequities in economic and social participation and gender-based violence; advancing the care and protection of children; strengthening the social and economic inclusion of the elderly and persons with disabilities; and deepening the impact of social assistance programmes (ESSJ, 2019).

Before the COVID-19 pandemic, there were notable improvements in the poverty indicators (Table 8). In 2019, some 11.0 per cent of the Jamaican population were living in poverty; this represented a 1.6 percentage point decline relative to 2018 and an 8.3 percentage point decline from 2017. For 2019, poverty was highest in the rural areas, 14.2 per cent compared with 4.7 per cent in the GKMA and 13.4 per cent in other urban centres.

Overall, extreme poverty was also declining; it stood at 5.4 per cent in 2017 and was 3.5 per cent in 2018, and 4.0 per cent in 2019. The GKMA had the largest decline with the food poverty rate moving from 5.5 per cent in 2017 to 0.4 per cent in 2019. On the other hand, in rural Jamaica, the food poverty rate was higher in 2019 (6.7 per cent) than it was in 2017 (5.6 per cent). In terms of children’s nutrition, the percentage of children under 5 years old whose height was lower than average for their age (stunting) was 4.1 per cent in 2018, down from 5.7 per cent in 2012. The prevalence of wasting (another measure of malnutrition) in 2018 was 2.6 per cent (JSLC 2018).

Table 8: Prevalence (%) of Poverty and Food Poverty by Region, 2017–2019

	Poverty			Food poverty		
	2017 ^r	2018	2019	2017 ^r	2018	2019
Region						
Greater Kingston Metropolitan Area (GKMA)	17.7	9.2	4.7	5.5	2.9	0.4
Other Urban Centres (OUC)	19.8	12.0	13.4	4.8	3.9	3.5
Rural Areas	20.2	15.0	14.2	5.6	3.7	6.7
Jamaica	19.3	12.6	11.0	5.4	3.5	4.0

r – revised

Per cent estimates are weighted

Discrepancies may be due to rounding

Source: Compiled by PIOJ with data supplied by STATIN

The MLSS commenced activities toward introducing electronic beneficiary payments in 2019. The electronic payment options are expected to facilitate beneficiary families' direct access to funds, as well as reduce the administrative expense and risks associated with cheque payments.

In 2019, the NIS provided benefits to 128 869 persons (40.7 per cent female); this was 9.0 per cent more than it did in 2018. Old age pension benefits remain the largest category with 96 325 individuals (54.4 per cent female) benefiting, representing an increase of 8.0 per cent compared with 2018 (ESSJ, 2019). In 2019, the scheme introduced a mobile unit to reach more individuals and improve service delivery to its clients.

IMPACTS

Some of the government's immediate responses to the onset of the COVID-19 pandemic were:

- restrictions on the movement of people
- changes in public transportation schedules and regulations
- closure and other restrictions to country borders

The government recognized that these measures would negatively affect Jamaicans, especially the poor. The immediate vulnerabilities and risks that became apparent and required a **social protection response** included:

- Unmet basic needs – food, shelter, medical support
- Household needs exacerbated by mobility restrictions
- Loss of livelihoods, including markets and assets. Temporary and extended loss of employment, particularly for low-income earners
- Risks to assets (e.g., mortgages, loans, insurance premiums)
- Risks of mass unemployment of vulnerable workers, many without social security
- Risks that extended closure of schools could impact educational outcomes
- Gender-related dynamics impacting household welfare
- Greater requirements for access to non-cash options for payment, calls for greater financial inclusion and flexibility to purchase goods and services.

Summarily, the pandemic adversely affected workers across micro, small, medium and large enterprises, to varying degrees within each category and has led to:

- Unemployment and underemployment
- Inconsistent or reduced income streams, including revenue and remittance flows
- Risks to standard of living, including the ability to consume goods and services
- Risk of poverty for many families because of a loss of or reduced wages.

Social assistance and security programmes

Programmes such as PATH, the School Feeding Programme (SFP), and the NIS were negatively affected. With PATH for example, most of its beneficiaries (about 105 000 families or 84.0 per cent) collect their payments by cheque. The MLSS had limited capacity to make payments electronically to all beneficiaries; electronic payments would have been an effective way of maintaining the social distancing guidelines. Also, reduced working hours due to curfew orders further curtailed the payment process by restricting beneficiaries' ability to collect payments.

The closure of schools (and canteens) interrupted the SFP. This was significant; for many students, school meals are the most reliable source of food daily. The UNICEF/CAPRI Study: Lasting impact: Educational, Social and Psychological Effects of the COVID-19 Pandemic on Children, highlighted that as of February 2020 – just before the onset of the pandemic – the SFP provided 70 000 children in government schools, at infant and primary levels, with reliable sources of nutritional meals at no cost. Although the programme continued during the pandemic, some students were unable to access the benefit within the school setting.

There was a lull in activities at the NIS. It stopped accepting applications for approximately three to four weeks because the staff was not in the office to process applications, restricting persons' access to benefits. The pandemic also affected its compliance-related activities, with inspections of employers and self-employed persons suspended in mid-March (COVID-19 Responses and Challenges Report 2020, PIOJ).

Vulnerable Groups

The Jamaica Council for Persons with Disabilities (JCPD) experienced disruptions processing applications for the various types of assistance it provides. Under the Economic Empowerment Grant Programme for example, social workers were hampered in conducting the visitations/investigations that are needed to assess applicants' socio-economic situation and their readiness to operate a sustainable and viable business. Visits to business locations were also affected because of social distancing and quarantine measures (COVID-19 Responses and Challenges 2020, PIOJ).

Very few applications were received under the Medical Assistance programme. The application form is available on its website, but the JCPD does not have a system to receive and process applications remotely. This presented a challenge for those persons with no access to print forms and transportation limitations. Similarly, the JCPD did not receive applications for scholarships under the Educational Assistance Programme (COVID-19 Responses and Challenges 2020, PIOJ).

Homeless persons were directly affected; nightly curfews limited volunteers' efforts to provide them with meals. (COVID-19 Responses and Challenges 2020, PIOJ).

Concerning the **outdoor poor**, there was an increased demand for the services under

the Poor Relief Programme as vulnerable groups expanded. As a result, the workload for Poor Relief staff increased to meet those demands. The **indoor poor** (those residing in state institutions) were also affected. They were emotionally affected, for example, because of decreased visitation from family and friends due to restrictions put in place by infirmaries. The restrictions were necessary as both residents and staff were at risk of contracting the disease (COVID-19 Responses and Challenges Report 2020, PIOJ).

Women and girls were not spared from the impact of COVID-19 on the delivery of welfare and social support programmes. Classes (academic instructions and counselling sessions) for adolescent mothers were suspended to reduce the likelihood of exposure to the virus. This heightened the risk of repeat pregnancies, with girls' inability to access public health systems to receive contraceptive methods.

The economic impact of the pandemic affected women's employment. Women were more likely to be engaged in lower-paying jobs compared with their male counterparts, though they may be more qualified. Labour force data from the Statistical Institute of Jamaica (STATIN) revealed that the unemployment rate for July 2020 was 12.6 per cent, 4.8 percentage points higher than for July 2019. The rate of increase was higher for females, 14.0 per cent, 2.5 percentage points higher than males.

In terms of access to food, the CAPRI/UNICEF study found that just under 45.0 per cent of households with at least one child experienced food shortages due to COVID-19 restrictions; this was felt more acutely in female-headed households (56.0 per cent). See Figure 10.

Children: the disruption of the School Feeding Programme has affected some children's ability to access food and proper nutrition.

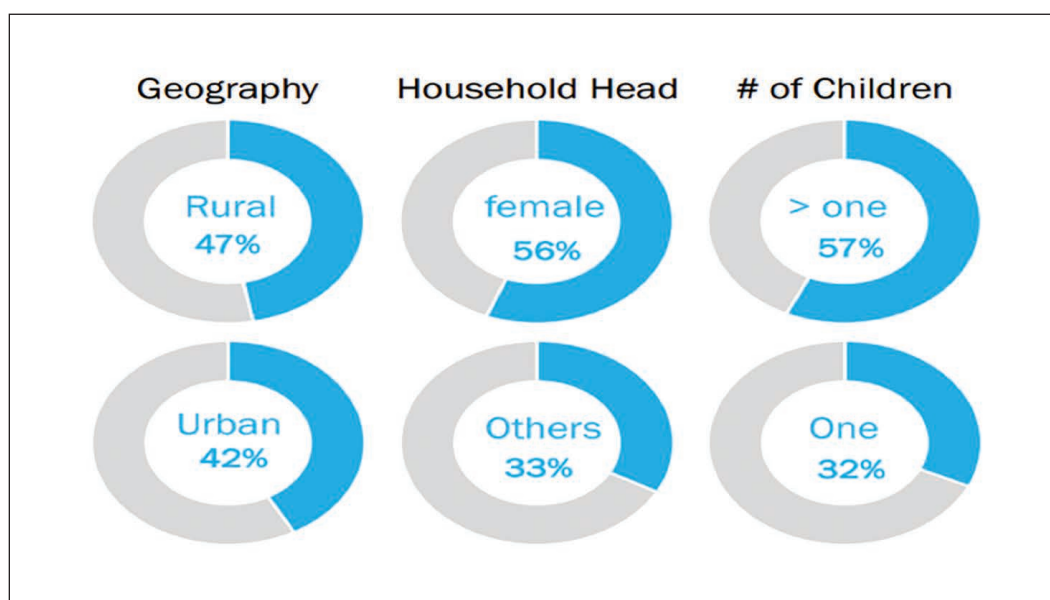


Figure 10: Share of Households that have Experienced Food Shortages

Source: UNICEF-CAPRI Study: Lasting impact: Educational, social and psychological effects of the COVID-19 pandemic on children (2021).

SOCIAL PROTECTION RESPONSE TO COVID-19

The GOJ, along with its partners, took broad and swift actions to help citizens and businesses to cushion the effects of the pandemic at its various stages. Social protection interventions were integral in lessening the negative impact on the poor and vulnerable. There was an overall commitment to increase the range of social protection services offered, which was led by the government. Among the key initiatives were:

- The design and rollout of the COVID-19 Allocation of Resources for Employees (CARE) Programme under its disaster response mechanism to the COVID-19 pandemic. This is regarded as the largest social support programme for the vulnerable in Jamaica's history. This cash transfer programme targeted individuals and businesses that were negatively affected by the effects of the pandemic. Beneficiaries included the unemployed, students, small business operators and the tourism sector
- An allocation of approximately \$8.5 billion was given by the GOJ in the Fiscal Year 2020/21 to the main cash transfer programme, PATH, to aid the registered elderly, persons with disabilities, children living in poor households, the adult poor and pregnant and lactating women. The GOJ also provided an extraordinary payment of benefits in May 2020 to alleviate the immediate effects of the pandemic on beneficiary families. Between April and June 2020, the GOJ increased the value of PATH payments by 50.0 per cent, benefiting 12.4 per cent of the population. In December 2021, the GOJ allocated an additional \$5.0 billion to the CARE element of the SERVE Jamaica Programme to cushion the impact of the pandemic on the most vulnerable in a targeted intervention
- MSMEs benefited from \$1.0 billion in tax credit to provide critical cash-flow support and reduce regulatory fees for certain crops which were also needed for food security.

Other social protection efforts targeted the vulnerable groups within the population, facilitating the delivery of benefits and services in ways that limited physical contact or crowding, and accommodating client services to offset risks to income security (ESSJ 2020). Some of these specific responses to the pandemic provided by the government and its partners to the various vulnerable groups are detailed in Table 9.

THE GOJ, ALONG WITH ITS PARTNERS, TOOK BROAD AND SWIFT ACTIONS TO HELP CITIZENS AND BUSINESSES TO CUSHION THE EFFECTS OF THE PANDEMIC AT ITS VARIOUS STAGES. SOCIAL PROTECTION INTERVENTIONS WERE INTEGRAL IN LESSENING THE NEGATIVE IMPACT ON THE POOR AND VULNERABLE.

Table 9: Response Measures to COVID-19 for Vulnerable Groups

Social Protection Priorities	Illustrative Response Efforts
Access to social assistance (welfare) support	<ul style="list-style-type: none"> • Collaboration with NGOs and the private sector for identification of vulnerable persons and provision of welfare packages.
	<ul style="list-style-type: none"> • COVID-19 PATH Grant: Extra payment made to 14 907 persons with disabilities on PATH. An extra payment of bi-monthly cash transfer to PATH households (in May 2020).
	<ul style="list-style-type: none"> • Expanded shelter and accommodation for the homeless.
	<ul style="list-style-type: none"> • 24-hour availability of Women's Crisis Centre facilities to mitigate risks of gender-based violence. Support victims of gender-based violence with accommodation, referral support and others services offered by the government.
Food security	<ul style="list-style-type: none"> • Monetization of school feeding allowance for PATH students and allocation of lunch money for students on the Poor Relief Programme.
	<ul style="list-style-type: none"> • Support to the elderly to access food baskets and secure prescription drugs.
	<ul style="list-style-type: none"> • JCPD Food/Care Package targeting 1 000 persons with disabilities who are vulnerable but not on PATH (\$3.5 million).
	<ul style="list-style-type: none"> • Cash payments to prepare breakfast and lunch for children while schools remained closed.
	<ul style="list-style-type: none"> • Increase in the frequency and provision of meals for the homeless.
Improved access to basic social services	<i>Education</i> <ul style="list-style-type: none"> • Extension of educational services for primary and secondary students using varied online platforms through extensive collaboration with media houses, and with support from the private sector.
	<ul style="list-style-type: none"> • Expedited procurement of tablets for students, and distribution of tablets to students on the GOJ welfare registers. Provision of hard copy teaching and learning materials (learning kits) where access to the Internet is limited or non-existent.
	<i>Health</i> <ul style="list-style-type: none"> • Support to the elderly to access help with the filling of prescriptions drugs.
	<ul style="list-style-type: none"> • The elderly were prioritized for COVID-19 vaccination programmes.
	<ul style="list-style-type: none"> • The RONA Helpline Senior Care Response was established to benefit those aged 70 years and older by responding to urgent needs such as medical care, food, and sanitation supplies. This was a collaborative effort between the Ministry of Local Government and Rural Development (MLGRD) and the Social Development Commission (SDC).

	<ul style="list-style-type: none"> Implementation of a psychosocial programme to help students, children in state care, staff and parents cope with the mental health challenges associated with the pandemic and the policies instituted.
Income security support	<ul style="list-style-type: none"> The elderly, including those not on the PATH, received compassionate and PATH grants.
	<ul style="list-style-type: none"> Cash transfers to unemployed persons with disabilities 18–65 years old.
	<ul style="list-style-type: none"> Early encashment of NIS pension vouchers within the specified months. Pensioners had the option of receiving their fortnightly payments in one monthly payment.
	<ul style="list-style-type: none"> Financial and insurance institutions' relief to their clients to ease financial pressures (e.g., extension of lapse periods, loan interest payment periods, fee waivers moratoriums, and medical allowance for drugs).
	<ul style="list-style-type: none"> Government take-up of farm glut and use of farmers' markets to cushion market losses.
	<ul style="list-style-type: none"> Allocating provisions to support against loss of employment or livelihood including: <ul style="list-style-type: none"> ◁ Cash transfers to support small businesses, entrepreneurs, etc. facing income/revenue losses. ◁ Transfers for tourism businesses to maintain employees.
	Supporting Employees with Transfer of Cash (SET Cash) programme which provided temporary cash transfers equal to US\$135.00 for individuals who lost their jobs between March 10 and June 30, 2020 because of COVID-19.
Inclusion, rights, equity safeguarded	Extending periods for access to cash grants through post offices and remittance agencies.
	Waiver of compliance checks and unconditional base benefit for PATH.
	The government collaborated with payment agencies and banks to effect more electronic transfers of benefits and advocate for low-risk bank accounts for beneficiary groups.
	Funding to facilitate virtual and physical opportunities for learning for vulnerable children. Additional support was given to children in residential care, LIFE placements and a Transitional Living programme for continued learning (through access to electronic devices or printed materials).
Governance	The National Social Protection Committee leveraged inter-agency collaboration and public-private partnerships to identify vulnerable seniors in need of social services and emergency relief during the pandemic.
	Proposals for fast-tracking pension reforms (i.e., private pensions Phase II) – e.g., contribution holidays, unlocking of benefits.

Source: Compiled with information from the Planning Institute of Jamaica (2021).

CHALLENGES AND GAPS

Jamaica faced several challenges to adequately delivering a social protection response to the pandemic. The experience with the COVID-19 response also highlighted gaps that can impact Jamaica's ability to engender *Effective Social Protection*. These include:

- Absence of a structured unemployment insurance system and weak protection from labour laws for thousands of workers
- Access to basic services such as electricity: vulnerable persons including students living in deep rural communities who have limited or no access to electricity, lack access to online teaching and learning, as well as learning sessions that are televised
- Access to the Internet: Students without access to the Internet and devices were disadvantaged in the remote learning environment. The cost of Internet services is also prohibitive. Additionally, children with disabilities often cannot take advantage of online learning; they require face-to-face interaction and stimulation. The immediate effects of limited face-to-face instruction and other COVID-19-related national restrictions are far-reaching and complex, with implications extending beyond learning loss (ESSJ 2020)
- No national identification system or social register for targeted social assistance purposes. This resulted in difficulty with determining vulnerability and reduced the options for ensuring that those most at risk were being served, and doing so without duplication
- The SPS recognizes children as the future labour resource; therefore, childcare and protection are critical issues to be addressed. School closures resulted in limited places for children to go; some children were left alone at home or in communities, often unsupervised, as some parents/guardians had to go to work to make ends meet. The 2021 UNICEF CAPRI Study, *Lasting impact: Educational, Social and Psychological Effects of the COVID-19 pandemic on children* pointed to increased use of harsh disciplining methods in the home (which was higher within households reporting a reduction in income).

OPPORTUNITIES PRESENTED BY COVID-19

The COVID-19 pandemic wreaked havoc on the Jamaican economy and society. It has, inter alia, so far exposed continuing or emerging inequities in the scope and reach of social services and social security provisions. At a structural level, these inequities require strategic interventions, whether through the development and strengthening of legislation, policies, or programmes that bring the distribution of benefits and services in line with rights-based approaches and social risk management.

“THE EXPERIENCE OF THE PANDEMIC HAS SERVED TO SPUR DECISIONS ON (A) SOCIAL PENSIONS FOR NEEDY ELDERLY PERSONS NOT IN RECEIPT OF CASH TRANSFERS OR PENSIONS; (B) CONDUCT OF A FEASIBILITY STUDY ON THE INTRODUCTION OF AN UNEMPLOYMENT INSURANCE SCHEME FOR WORKERS; AND (C) FLEXIBLE AND ADAPTIVE SHOCK RESPONSE THROUGH PAYMENT OF AN EXTRA BI-MONTHLY TRANSFER TO BENEFICIARIES ON THE MAJOR CASH TRANSFER PROGRAMME. THESE TYPES OF PROVISIONS BROADEN SAFETY NETS, AS WELL AS EXPAND SOCIAL INSURANCE COVERAGE TO IMPROVE RESPONSES TO SHOCKS.”

Source: The Annual Report 2020/21 of the NSPC (July 2021).

In July 2021, the GOJ launched the Social Pension Programme for the elderly. The \$800 million programme provides a guaranteed income for vulnerable persons 75 years and older. Seniors targeted are those not currently in receipt of a pension, disability benefit or other retirement benefits, cash grant from PATH or Poor Relief programme, and who do not reside in a government institutional care facility.

Public-private sector partnerships for social protection have expanded. There is an indication that existing partnerships have been strengthened while numerous new partnerships have been forged primarily in areas of telecommunications, provision and distribution of food and other consumer items, ICT support and capacity building. Furthermore, the issue of unemployment insurance discussions is now a key priority. See Box 3.

The National Social Protection Committee Policy Briefs (2018–2020) noted:

“INTERESTINGLY, ALL OF THE SOCIAL PROTECTION AND LABOUR DYNAMICS THAT HAVE COME TO THE FORE OVER THIS PERIOD HAVE BEEN CONSIDERATIONS ALREADY ENVISAGED WITHIN THE JAMAICA SOCIAL PROTECTION STRATEGY, THE NATIONAL POVERTY REDUCTION POLICY AND PROGRAMME, AND OTHER SUPPORTING POLICY DOCUMENTS.”

COVID-19 exacerbated many of the social protection challenges identified prior to the pandemic. It has nonetheless highlighted social protection’s strong role in ensuring social stability, whilst mitigating shocks and ensuring that mechanisms are in place to flexibly respond to the varied needs of expanding vulnerable groups, to prevent

BOX 3. DIGITISATION AND SOCIAL PROTECTION

CAN DIGITALIZATION CHANGE THE FACE OF SOCIAL PROTECTION IN JAMAICA AND MAKE IT MORE “EFFECTIVE”?

Effective Social Protection remains an imperative for Jamaica. Research shows that Jamaica is one of the Caribbean countries that has a fairly strong and developed social protection system and has made creditable progress in adapting its system to be more responsive to shocks. The research recommends continued investment to shockproof programmes to guarantee service delivery, even after shocks.

The pandemic exposed and exacerbated the limitations of the country’s telecommunications infrastructure, and the low level of digitization and automation in the society and economy. However, during the pandemic, information technology facilitated the provision of basic social services (e.g., remote learning for the education sector) and electronic payments continued under PATH’s Beneficiary Management Information System. The CARE Programme used an online portal to initiate the delivery of social support to some 400,000 persons, processing their applications within six weeks. Digitalization could therefore be a game changer, contributing to making social protection more effective.

There are six key areas that could benefit from digitalization:

1. **Identity verification:** To support expansion of services such as social registries, financial inclusion and access to social security. The pandemic exposed the lack of a secure national identification system and the weak financial inclusion to formal banking systems, which resulted in more challenges and consumed greater resources than would have been efficient.
2. **Eligibility assessment:** This involves the use of automated programmes, such as PATH’s Beneficiary Identification System (BIS), to assess eligibility and benefit entitlements.
3. **Payments:** Electronic payments are ideal for getting payments directly to beneficiaries in the most cost effective and quickest possible time. This also supports financial inclusion.
4. **Fraud prevention and detection:** With the processing power to crossmatch millions of data points in seconds, digital technology can help to minimize fraud.
5. **Risk scoring and need classification:** Digitalization helps to calculate risk to determine what and how much will be provided based on predictions from the behaviour of a general population group (e.g., unemployment insurance).
6. **Communication between social protection authorities and beneficiaries:** Digital technologies allow for reaching more people in a shorter time. The pandemic forced service providers and beneficiaries to move online. Additionally, more people including seniors are using social media to engage with others.

Jamaica is on the cusp of fully embracing digital reforms in the Social Protection arena. There are many examples globally to demonstrate that the digital economy for example, presents limitless opportunities in the delivery of Social Protection provisions. With that said, not all countries have the financial strength to meet the high input costs associated with technology-based delivery systems.

Sources: Oxford Policy Management & World Food Programme. Shock-Responsive Social Protection in the Caribbean: Jamaica Case Study (2020). Planning Institute of Jamaica. National Social Protection Committee Policy Briefs 2018–2020 (2021).

long-term undesirable outcomes. If the country is to move forward toward a resilient recovery from the pandemic and prepare for other pandemics, natural disasters and climate change-related events, there needs to be a redoubling of efforts and resources toward securing the rights to basic services and resources, particularly for the most vulnerable.

As Jamaica approaches the recovery phase and refocuses on *Engendering Effective Social Protection*, there are some national-level policy, system and programme strengthening actions for consideration. These include:

- Developing a system of **national identification**; this will support resource programming, reduce duplication and advance the reach of services through meaningful data
- Creating a **national registry** that accommodates data for potential (and existing) beneficiaries of targeted government support relating to safety nets, subsidies and waivers, basic social services, food security, disability and caregiver support. This registry would offer the ability to respond to different vulnerabilities, scale-up efforts, or direct swift allocation of transfers to people already determined to be vulnerable or at risk
- **Registration of informal organizations** is critical for inclusion and can assist several livelihood groupings in respect of advocacy, access to information, access to financial resources, and eligibility for services and support. This will also serve to advance the formalization of the informal sector in areas such as registration, certification, licensing
- Evaluating the existing system for **case management** and considering the development of a common case management and referral system for social protection and poverty reduction
- Accelerating **Fintech** and **Digital Banking** to modernize Jamaica's economy, deepening financial inclusion (reducing un-banked population), and lowering the cost of financial services
- Advancing the **Direct Deposit modality** for cash transfer and pension programmes and advancing wider financial literacy
- Considering an **Unemployment Insurance** benefit that would in the future bolster employees experiencing temporary loss of work, based on an approved contributory scheme
- Expanding the use of, and further **integrating technology** to facilitate better access to information and improve service delivery. The creation of new partnerships, particularly in areas of ICT infrastructure and development could serve to fill gaps regarding digital delivery and migration of some services to online platforms, along with the use of database management systems for record retention. Other strategies, such as prioritization of incremental public expenditure towards deepening Internet/broadband connectivity towards advancing Jamaica

as a digital society, will be critical

- Conducting **Disability Assessments** to inform estimates of prevalence, and subsequent timely revision of a National Policy for Persons with Disabilities
- Establishing appropriate **Information, Education and Communication modalities** for persons with varying disabilities
- Ensuring the national policy and planning development processes, and all major projects, are **inclusive of considerations for persons with varying disabilities**
- Accelerating the **implementation of the National Policy for Senior Citizens** including the strengthening of administrative systems and establishing and sustaining collaborative partnerships
- Developing a **scanning/early warning system** to examine global dynamics regarding social protection in the face of shocks and disasters, to facilitate proactive and mitigative approaches.

CONCLUSION

The social protection system in Jamaica became the main mechanism for the GOJ and its partners to provide timely assistance to the vulnerable and their families during the pandemic, and to mitigate its effects. Jamaica used both pre-existing transfer programmes (conditional transfers for families) and new programmes (social pensions) to expand social protection coverage in the face of COVID-19. In addition, social security and labour market mechanisms were also adapted to protect employment in response to the restrictive COVID-19 measures.

Several priorities/imperatives (including identification, registration, and payment modalities, digitalization of processes, teleworking regulation/flexible work modality) highlighted in the Social Protection Strategy and aligned frameworks are back in play. Shock responsive social protection became the instrument used by countries to mitigate the negative socio-economic effects of shock events similar or dissimilar to COVID-19. The pandemic has reshaped the national landscape and dialogue, providing the opportunity to invest in and strengthen social protection systems for all on the development agenda.

THE SOCIAL PROTECTION SYSTEM IN JAMAICA BECAME THE MAIN MECHANISM FOR THE GOJ AND ITS PARTNERS TO PROVIDE TIMELY ASSISTANCE TO THE VULNERABLE AND THEIR FAMILIES DURING THE PANDEMIC, AND TO MITIGATE ITS EFFECTS.

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